

IDAHO EMPLOYMENT

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State Overview

IDAHO'S UNEMPLOYMENT RATE INCREASED TO 5.5 PERCENT

The seasonally adjusted unemployment rate for March 2003 was 5.5 percent, an increase of two-tenths of a percentage point from February's revised rate of 5.2 percent. Idaho's March unemployment rate was two-tenths of a percentage point below the 5.7 percent rate experienced one year ago, and three-tenths of a percentage point below the national unemployment rate. The national unemployment rate in March remained unchanged at 5.8 percent, up one-tenth of a percentage point from March 2002.

Idaho's seasonally adjusted *Civilian Labor Force* increased in March from February. The number of unemployed persons increased by 2,200 to 38,200 in March. Over 1,000 workers laid off in late February at Micron Technology in Boise largely influenced the increase in the number of jobless workers. Seasonally adjusted, the number of persons working was down by 1,900 to 654,600. The normal increase in seasonal jobs was not enough to offset the job losses at Micron and elsewhere in the state.

As slow as Idaho's economy has been in recovering from the recession, it is positive to note that from one year ago the number of persons employed has increased by 11,600. Also, even with the numerous layoffs in late February and early March, the number of unemployed persons has decreased by 2,100 from March 2002. As a result of the changes in the number of persons employed and unemployed, Idaho's labor force shows an increase of 1.4 percent, or 9,500, since March 2002. Nationally, the number employed increased by nearly 1.8 million people between March 2002 and March 2003. This was a 1.3 percent increase nationally compared to a 1.8 percent increase in Idaho.

Employment opportunities typically begin to increase in March as the season changes and the weather improves leading to increases in agricultural and construction activity. Most retail outlets experience an increase in activity as the spring and summer shopping season begins. Activity in the recreation sectors continues to be strong in March because the winter sports don't give way to the spring sports until late in the month or until early April. This year things were very similar. Good weather encouraged more outdoor activity. However, the significant number of workers laid off recently and the continuing sluggish economy overall resulted in fewer new jobs being created. The March unadjusted numbers showed an employment growth of 5,200, which was 300 short of the number of new jobs that were expected by the seasonal adjustment process used in the labor force calculations. If the economy had been on an upswing,

more new jobs would have been created, resulting in an increase in seasonally adjusted employment.

Area and County Labor Force Highlights

The five northern-most counties form the Panhandle Labor Market Area (LMA)—Benewah, Bonner, Boundary, Kootenai, and Shoshone Counties. The area's economy is highly reliant on forest and wood products, and this basic industry has been in the doldrums for the last several years. This and sizeable population growth in Kootenai County accounts for the Panhandle LMA's high unemployment rate which, for March, was the highest among the LMAs at 7.9 percent. The Idaho-Lewis LMA in North Central Idaho, which includes Idaho and Lewis Counties, usually has a high unemployment rate, too, and in March it was 7.6 percent. The state's most populous area, the Boise City Metropolitan Statistical Area (MSA), had an unemployment rate of 5.6 percent, just above the statewide average of 5.5 percent. The LMA with the lowest rate was Bonneville in Northeastern Idaho at 3.6 percent. Two other LMAs had rates below 4.0 percent: Magic Valley and Seaport, both at 3.9 percent. The Seaport LMA includes Asotin County, Washington, which has a labor force roughly half that of its LMA partner Nez Perce County, Idaho.

Four counties experienced double-digit unemployment rates in March: Adams at 11.7 percent, Benewah at 10.5 percent, Clearwater at 10.0 percent, and Shoshone at 10.6 percent. Unemployment rates below 3.0 percent occurred during March 2003 in Owyhee County at 2.7 percent and Madison County at 1.9 percent. County and LMA labor force data can be found on State Table 1 on page 3.

EMPLOYMENT BY INDUSTRY

State Table 3 on page 5 provides industry employment and comparisons to the previous month and year.

Total *Nonfarm Payroll Jobs* in Idaho totaled 555,000 in March 2003. This was a 2,500-job increase from the previous month, thereby reversing the consecutive month-over-month job loss pattern that began in October 2002. The March 2003 total is also a 4,200-job increase from March 2002. This good news must be seen, however, against the total picture of recent job losses. From a record high of 578,600 in September 2002, *Nonfarm Payroll Jobs* employment has declined by 4.1 percent and the March 2003 total is 12,000 jobs below the 2002 annual average of 567,300.

Service-Producing Industries employment increased by 3,000 jobs from February to March. This gain more than offset the monthly job loss of 500 in the *Goods-Producing Industries*. A similar picture holds true in the year-over-year comparison—*Service-Producing Industries* increased by 5,800 jobs while the *Goods-Producing Industries* lost 1,600 jobs.

Construction employment had a gain of 700 jobs from February to March 2003, and from one year earlier. Although winter weather slows some building projects, notably road and bridge work, the 32,200-employment level is consistent with the 31,000 - 33,000 level experienced during the first quarter of each year since 2000. New residential and commercial buildings have sustained *Construction* employment. In its February 2003 issue of Idaho Construction Report, Wells Fargo Bank cited values of new residential building per-

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jhyer@jobservice.us

or to the Regional Labor Economists noted in each area news section.

Editor: Jean Cullen (jcullen@jobservice.us)

DIRK KEMPTHORNE, GOVERNOR

Roger B. Madsen, Director



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mits issued in January and February 2003 that were 32 percent more than the permits issued last year during this time. Nonresidential building permit values were up 277 percent. The bank concluded that “the underlying fundamentals of Idaho’s economy” as well as declining interest rates encouraged this construction activity.

Logging experienced a loss of 300 jobs from February to March 2003. Weather conditions play a large role in job fluctuations in Idaho’s forest products industries, especially *Logging*. In late winter/early spring, snow starts to melt, ground thaws, and mud brews, making logging difficult, so it is not unusual to have job losses in that industry during March. On the manufacturing side, *Wood Product Manufacturing* was unchanged on the monthly basis and up by 200 jobs from a year ago. *Sawmill* jobs remained stable, although possible temporary shutdowns and layoffs are on the horizon.

Idaho’s *Computer & Electronic Products Manufacturing* industry has suffered as a result of the national recession and continuing cautious business investment expenditures. The demand for and price of Idaho products has been depressed, and this has led to layoffs, closures, and general belt-tightening among Idaho employers. In mid-February, this trend continued with a 1,100-person layoff at Micron Technology’s Boise facility. Micron makes DRAM and other kinds of memory chips that are used in a vast array of electronic devices. This layoff was the major contributor to the 1,000-job loss in March from February and the loss of 1,900 jobs from March 2002. A few Idaho employers in this industry have announced possible future layoffs or downsizing while other employers state their business is stable or good in their particular product markets.

Although *Food Manufacturing* employment was almost unchanged, this industry is being closely watched for possible large employment shifts due to structural changes that are occurring in Idaho agriculture. In 2002, several firms announced plant closures, shift curtailments, and general downsizing. Some of the job losses have occurred, but others are scheduled for future dates. Some of the downsizing is due to business cost realities: products can be processed closer to major markets, old plants are costly to modernize, and an increasing number of businesses are importing product supplies. Shifts in customer preferences are causing food processors to rethink what, where, and how their products are made. For example, simply making French-fried potatoes and then freezing the product for distribution might not be enough to sustain some processing plants. Creating

State Table 1: March 2003 Labor Force (preliminary)				
Seasonally Adjusted	Labor Force	Unemp.	% Unemp.	Total Emp.
Seaport LMA	36,362	1,426	3.9	34,936
Nez Perce County	24,109	920	3.8	23,189
Asotin County, WA	12,253	506	4.1	11,747
Boise City MSA	248,232	13,822	5.6	234,410
Ada County	178,499	9,062	5.1	169,437
Canyon County	69,733	4,760	6.8	64,973
Pocatello City MSA*	40,802	2,074	5.1	38,728
Bonneville LMA	83,758	3,043	3.6	80,715
Bingham County	22,269	949	4.3	21,321
Bonneville County	49,730	1,632	3.3	48,098
Butte County	1,547	62	4.0	1,485
Jefferson County	10,212	401	3.9	9,811
Cassia-Minidoka LMA	20,301	1,358	6.7	18,942
Cassia County	10,229	651	6.4	9,578
Minidoka County	10,071	707	7.0	9,364
Idaho-Lewis LMA	8,187	623	7.6	7,565
Idaho County	6,713	563	8.4	6,150
Lewis County	1,475	60	4.1	1,415
Panhandle LMA	92,351	7,266	7.9	85,085
Benewah County	4,308	451	10.5	3,857
Bonner County	17,694	1,279	7.2	16,415
Boundary County	4,375	310	7.1	4,065
Kootenai County	59,574	4,572	7.7	55,001
Shoshone County	6,401	654	10.2	5,747
Magic Valley LMA	54,066	2,105	3.9	51,961
Gooding County	7,564	246	3.3	7,318
Jerome County	10,022	377	3.8	9,645
Twin Falls County	36,480	1,481	4.1	34,998
Adams County	1,808	212	11.7	1,596
Bear Lake County	3,123	172	5.5	2,952
Blaine County	12,424	489	3.9	11,935
Boise County	2,703	160	5.9	2,543
Camas County	478	30	6.4	448
Caribou County	3,286	250	7.6	3,035
Clark County	602	27	4.5	575
Clearwater County	3,650	366	10.0	3,284
Custer County	2,282	168	7.4	2,114
Elmore County	9,943	705	7.1	9,237
Franklin County	5,458	196	3.6	5,262
Fremont County	5,262	326	6.2	4,936
Gem County	6,112	474	7.8	5,638
Latah County	16,314	499	3.1	15,815
Lemhi County	3,905	277	7.1	3,628
Lincoln County	2,244	119	5.3	2,125
Madison County	11,929	224	1.9	11,704
Oneida County	1,796	77	4.3	1,719
Owyhee County	4,033	110	2.7	3,922
Payette County	9,908	847	8.5	9,061
Power County	3,310	302	9.1	3,008
Teton County	3,915	166	4.2	3,749
Valley County	4,081	360	8.8	3,721
Washington County	4,338	398	9.2	3,941
State of Idaho	694,709	38,166	5.5	656,543
Idaho Cities				
Boise	106,404	5,486	5.2	100,918
Coeur d’Alene	21,092	1,233	5.8	19,859
Idaho Falls	30,122	1,053	3.5	29,070
Lewiston	20,693	686	3.3	20,007
Nampa	21,376	1,540	7.2	19,836
Pocatello	29,585	1,479	5.0	28,106
Twin Falls	19,225	807	4.2	18,419

* Pocatello MSA includes all of Bannock County.

new potato products and ready-to-cook meals, using potatoes as a raw resource in the manufacture of non-food products, or processing other Idaho crops are cited as ways to sustain the food processing industry.

Any changes in production at a food processing plant can have a tremendous impact on local economies. Growers have to adjust crop production and types, which often requires large financial investments; farm supply businesses have to adjust equipment and materials inventories, repair capabilities, and may need to train staff in new methods. Some crops are relatively labor intensive, others are not; some crops need tremendous amounts of water and others do not. And increasingly in Idaho, dairying and cheese making are becoming more prevalent, which brings about increased competition for arable land to grow hay and other feed crops. In addition, new concerns arise about controlling environmental degradation from waste products and odors.

Traditional Idaho crops are also facing competition for land and water from increased barley production and vineyards. Finally, some of the stiffest competition for prime agricultural land comes in the form of new homes and business centers instead of crops. Many acres of farm land near larger cities have been converted to other uses. Seed crops in particular reportedly have been reduced because of population growth.

The decline in food processing employment via plant closures or downsizing that is currently occurring in Idaho, has significant economic impact on the small towns in which they are usually located. With Idaho agriculture in the midst of structural changes, these events most likely will lead to further job losses at these plants as they now exist.

There were several bright spots in the *Services-Producing Industries* in March. Only two industry classifications lost jobs from February to March—

Transportation & Warehousing (-200) and *Professional, Scientific, and Technical Services* (-100). *Leisure and Hospitality* added 100 jobs, providing evidence that these industries are slowly recovering from the effects of the September 11 events. *Health Care & Social Assistance Services* added 300 jobs and *State and Local Government Education* combined to add 1,100 jobs.

Agriculture

The demand for hired workers in the agricultural sector began to build in March with an estimated 24,200 persons employed. This was a 13.6 percent increase from the number of hired workers in February.

Relatively warm weather and the right amount of precipitation was favorable for early planting of most row crops. Unfortunately, these same conditions continued to cause growers to be concerned about adequate water supplies in the summer. Forecasts for some areas of the state, however, predict less-than-adequate summer water supplies.

The Idaho Agricultural Statistics Service issued its annual report, 2002 Crop Production. This report provides production and price data on Idaho crops, excluding livestock/animals. (See State Table 2, below.)

Estimates of the 2002 sugar beet production value are not available, as the 2002 crop is not completely processed by the end of the year. Fruit crop acreage is not measured.

In addition to the commodities listed in the table, Idaho nurseries and greenhouses sold an estimated 56.4 million dollars of plants and plant materials (including Christmas trees) in 2002. This is an increase of 2.0 percent from last year and 1.0 percent from 2000.

James Adams, Sr. Planner/Economist
317 W. Main Street, Boise, ID 83735
(208) 332-3570, ext. 3219
E-mail: jadams@jobservice.us

State Table 2: 2001 and 2002 Idaho Annual Crop Summary Totals

Type of Crop	Acres Harvested (acres in 1,000s)		Value of Production (dollars in \$1,000s)	
	2001	2002	2001	2002
Field Crops (incl. sugar beets)	4,178.4	4,500.7	1,986,361	--
Field Crops (excl. sugar beets)	3,999.4	4,290.7	1,798,603	1,867,445
Fruit Crops	--	--	21,030	24,884
Vegetable Crop (onions only)	7.8	7.9	34,765	37,404
Total, All (incl. sugar beets)	4,186.2	4,508.6	2,042,156	--
Total, All (excl. sugar beets)	4,007.2	4,298.6	1,854,368	1,929,733

Source: *Agriculture in Idaho*, Issue 3-03

State Table 3: Nonfarm Payroll Jobs

% Change From

BY PLACE OF WORK	March 2003*	Feb 2003	March 2002	Last Month	Last Year
Nonfarm Payroll Jobs**	555,000	552,500	550,800	0.5	0.8
GOODS-PRODUCING INDUSTRIES	96,000	96,500	97,600	-0.5	-1.6
Natural Resources & Mining	3,100	3,300	3,000	-6.1	3.3
Logging	1,400	1,700	1,400	-17.6	0.0
Mining	1,700	1,600	1,600	6.3	6.3
Metal Ore Mining	500	500	500	0.0	0.0
Construction	32,200	31,500	31,500	2.2	2.2
Manufacturing	60,700	61,700	63,100	-1.6	-3.8
Durable Goods	37,400	38,600	39,400	-3.1	-5.1
Wood Product Manufacturing	7,400	7,400	7,200	0.0	2.8
Sawmills & Wood Preservation	3,000	3,000	2,900	0.0	3.4
Veneer & Engineered Products	1,300	1,300	1,200	0.0	8.3
Other Wood Product Manufacturing	3,100	3,100	3,100	0.0	0.0
Fabricated Metal Product Manufacturing	3,600	3,600	3,500	0.0	2.9
Machinery Manufacturing	2,900	2,900	2,900	0.0	0.0
Computer & Electronic Product Manufacturing	16,000	17,000	17,900	-5.9	-10.6
Transportation Equipment Manufacturing	2,100	2,100	2,100	0.0	0.0
Other Durable Goods	5,400	5,600	5,800	-3.6	-6.9
Nondurable Goods	23,300	23,100	23,700	0.9	-1.7
Food Manufacturing	15,500	15,400	15,800	0.6	-1.9
Fruits & Vegetable Preserving & Specialty	7,900	7,800	8,100	1.3	-2.5
Paper Manufacturing	1,700	1,700	1,700	0.0	0.0
Printing & Related Support Activities	2,000	2,000	2,000	0.0	0.0
Chemical Manufacturing	1,800	1,800	2,000	0.0	-10.0
Other Nondurable Goods	2,300	2,200	2,200	4.5	4.5
SERVICE-PRODUCING INDUSTRIES	459,000	456,000	453,200	0.7	1.3
Trade, Transportation, & Utilities	112,200	111,800	112,900	0.4	-0.6
Trade	94,300	93,700	95,000	0.6	-0.7
Wholesale Trade	24,300	24,200	24,900	0.4	-2.4
Wholesalers, Durable Goods	11,600	11,500	11,300	0.9	2.7
Wholesalers, Nondurable Goods	11,200	11,000	11,600	1.8	-3.4
Retail Trade	70,000	69,500	70,100	0.7	-0.1
Motor Vehicle and Parts Dealers	10,400	10,200	10,600	2.0	-1.9
Building Material and Garden Equipment	7,300	7,200	7,000	1.4	4.3
Food & Beverage Stores	12,200	12,200	12,300	0.0	-0.8
General Merchandise Stores	14,300	14,200	14,300	0.7	0.0
Transportation, Warehousing, & Utilities	17,900	18,100	17,900	-1.1	0.0
Utilities	1,900	1,900	1,800	0.0	5.6
Transportation & Warehousing	16,000	16,200	16,100	-1.2	-0.6
Rail Transportation	1,300	1,300	1,300	0.0	0.0
Truck Transportation	8,000	8,200	7,700	-2.4	3.9
Information	8,900	9,000	9,200	-1.1	-3.3
Telecommunications	3,100	3,100	3,200	0.0	-3.1
Financial Activities	25,700	25,600	25,000	0.4	2.8
Finance & Insurance	19,300	19,200	18,800	0.5	2.7
Real Estate & Rental & Leasing	6,400	6,400	6,200	0.0	3.2
Professional & Business Services	67,300	66,900	65,200	0.6	3.2
Professional, Scientific, & Technical	27,900	28,000	28,000	-0.4	-0.4
Scientific Research & Development	7,200	7,100	7,400	1.4	-2.7
Management of Companies & Enterprises	8,500	8,400	8,700	1.2	-2.3
Administrative & Support & Waste Management	30,900	30,500	28,500	1.3	8.4
Administrative & Support Services	29,800	29,400	27,500	1.4	8.4
Educational & Health Services	61,600	61,200	59,200	0.7	4.1
Educational Services	7,200	7,100	6,800	1.4	5.9
Health Care & Social Assistance	54,400	54,100	52,400	0.6	3.8
Hospitals	13,300	13,300	13,400	0.0	-0.7
Leisure & Hospitality	52,400	52,000	50,400	0.8	4.0
Arts, Entertainment, & Recreation	8,600	8,500	6,500	1.2	32.3
Accommodation & Food Services	43,800	43,500	43,900	0.7	-0.2
Accommodation	7,200	7,100	7,400	1.4	-2.7
Food Services & Drinking Places	36,600	36,400	36,500	0.5	0.3
Other Services	17,100	17,100	18,100	0.0	-5.5
Total Government	113,800	112,400	113,200	1.2	0.5
Federal Government	12,000	12,000	12,300	0.0	-2.4
State & Local Government	101,800	100,400	100,900	1.4	0.9
State Government	29,400	28,600	30,100	2.8	-2.3
State Government Education	14,700	14,000	14,700	5.0	0.0
State Government Administration	14,700	14,600	15,400	0.7	-4.5
Local Government	72,400	71,800	70,800	0.8	2.3
Local Government Education	38,900	38,500	38,100	1.0	2.1
Local Government Administration	30,900	30,800	30,200	0.3	2.3
Local Government Tribes	2,600	2,500	2,500	4.0	4.0

*Preliminary Estimate

** Estimates include all full or part time wage and salary workers who worked or received pay in the following industry groups during the pay period ending nearest the 12th of the month.

State Table 4: Economic Indicators

	March 2003	Feb 2003	March 2002	% Change From	
				Last Month	Last Year
IDAHO LABOR FORCE ⁽¹⁾					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	694,700	692,900	685,200	0.3	1.4
Unemployment	38,200	36,100	40,300	5.8	-5.2
Percent of Labor Force Unemployed	5.5	5.2	5.9		
Total Employment	656,500	656,800	644,900	0.0	1.8
<i>Unadjusted</i>					
Civilian Labor Force	687,900	683,300	678,400	0.7	1.4
Unemployment	44,400	45,000	46,500	-1.3	-4.5
Percent of Labor Force Unemployed	6.5	6.6	6.9		
Total Employment	643,500	638,300	631,900	0.8	1.8
U. S. UNEMPLOYMENT RATE ⁽²⁾	5.8	5.8	5.7		
U.S. CONSUMER PRICE INDEX ⁽²⁾					
Urban Wage Earners & Clerical Workers (CPI-W)	180.3	179.2	174.7	0.6	3.2
All Urban Consumer (CPI-U)	184.2	183.1	178.8	0.6	3.0
AGRICULTURE					
Agriculture Employment	33,630	30,720	29,640	9.5	13.5
Operators	9,010	9,010	9,010	0.0	0.0
Unpaid Family	360	360	430	0.0	-16.3
Hired Workers	24,260	21,350	20,200	13.6	20.1
UNEMPLOYMENT INSURANCE					
<i>Claims Activities</i>					
Initial Claims ⁽³⁾	13,332	14,302	14,563	-6.8	-8.5
Weeks Claimed ⁽⁴⁾	142,258	125,508	116,788	13.3	21.8
<i>Benefit Payment Activities⁽⁵⁾</i>					
Weeks Compensated	103,963	109,469	101,775	-5.0	2.1
Total Benefit \$ Paid	\$23,189,907	\$24,354,097	\$22,886,001	-4.8	1.3
Average Weekly Benefit Amount	\$223.06	\$222.47	\$224.87	0.3	-0.8
Covered Employers	40,864	40,705	39,945	0.4	2.3
Total Benefit \$ Paid During Last 12 Months ⁽⁴⁾	\$215,586,862	\$215,282,957	\$172,400,572	0.1	25.0

(1) Preliminary Estimate

(2) Source: U.S. Bureau of Labor Statistics

(3) Includes all entitlements/programs on Intrastate and Interstate Agent, New, and Additional Claims

(4) Includes all entitlements/programs, Intrastate and Interstate Agent

(5) Includes all entitlements/programs, Total Liable Activities



PANHANDLE

BENEWAH, BONNER, BOUNDARY, KOOTENAI, & SHOSHONE COUNTIES

EMPLOYMENT TRENDS

Recent layoff announcements suggest that the Panhandle's job losses in manufacturing, call centers, and retail stores are not over. Yet the last few months also have brought much good news. Since January 1, the Panhandle has learned about the recruitment, opening, and expansion of many businesses. With the hosting of the Ironman Triathlon in June, the opening of Silverwood Theme Park's Boulder Beach water park on July 1, this spring's unveiling of the remodeled Coeur d'Alene Resort Golf Course, and expansion at the Coeur d'Alene Tribal Casino, this summer should shatter tourism records. Residential construction and the real estate industry also are showing tremendous strength.

Job losses and spring break-up pushed the Panhandle's seasonally adjusted unemployment rate from 7.3 percent in February to 7.9 percent in March. See Panhandle Table 1 for details. Despite the month-over-month increase in the unemployment rate, it remained below the 8.7 percent of March 2002. The layoffs described in this article occurred after the week of March 12, so they did not affect the March unemployment rate.

AREA DEVELOPMENTS

Benewah County

- Potlatch began upgrading its St. Maries complex this spring. The \$2.7 million project will boost lumber production and increase the sawmill's efficiency by attaining even more product out of every log. In addition, the project will allow the plywood plant to begin peeling veneer to sell to companies that make laminated veneer lumber. Making a large investment during this time of low lumber prices exhibits a strong commitment to the St. Maries community. The St. Maries complex employs about 320 people. The upgrade will cause some interruptions in employment while new equipment is installed. The complex shut down for six days over Memorial Day weekend and will shut down for 21 days in July.

Boundary County

- Louisiana-Pacific (L-P) shut down its Bonners Ferry mill in late April for an

Panhandle Table 1: Labor Force & Employment

	March 2003*	Feb 2003	March 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	92,350	91,970	90,840	0.4	1.7
Unemployed	7,270	6,750	7,940	7.7	-8.4
% of Labor Force Unemployed	7.9	7.3	8.7		
Total Employment	85,080	85,220	82,900	-0.2	2.6
Unadjusted					
Civilian Labor Force	91,540	90,570	90,090	1.1	1.6
Unemployed	9,740	9,100	10,490	7.0	-7.1
% of Labor Force Unemployed	10.6	10.0	11.6		
Total Employment	81,800	81,470	79,600	0.4	2.8
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	65,930	65,620	65,020	0.5	1.4
Goods-Producing Industries	11,670	11,800	11,690	-1.1	-0.2
Natural Resources & Mining	1,320	1,510	1,340	-12.6	-1.5
Construction	3,620	3,510	3,600	3.1	0.6
Manufacturing	6,730	6,780	6,750	-0.7	-0.3
Wood Product Manufacturing	2,790	2,800	2,780	-0.4	0.4
Other Manufacturing	3,940	3,980	3,970	-1.0	-0.8
Service-Producing Industries	54,260	53,820	53,330	0.8	1.7
Trade, Transportation, & Utilities	12,890	12,840	12,920	0.4	-0.2
Wholesale Trade	1,300	1,290	1,300	0.8	0.0
Retail Trade	9,920	9,810	9,980	1.1	-0.6
Utilities	360	360	360	0.0	0.0
Transportation & Warehousing	1,310	1,380	1,280	-5.1	2.3
Information	1,280	1,260	1,300	1.6	-1.5
Financial Activities	2,890	2,880	2,720	0.3	6.3
Professional & Business Services	6,240	6,150	6,040	1.5	3.3
Educational & Health Services	6,780	6,730	6,460	0.7	5.0
Leisure & Hospitality	7,300	7,180	7,300	1.7	0.0
Other Services	2,260	2,260	2,130	0.0	6.1
Government Education	5,270	5,210	5,190	1.2	1.5
Government Administration	8,350	8,310	8,270	0.5	1.0
Government Tribes	1,000	1,000	1,000	0.0	0.0

* Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

indefinite period. The shutdown, which is likely to last several months, idled more than 120 production workers. Low lumber prices also had forced L-P to shut down the mill for six weeks in November and December.

- The 2003 Governor's Conference on Recreation and Tourism named Bonners Ferry Idaho's Friendliest Town. The designation was based on a survey of tourists. Bonners Ferry, a portal for Americans visiting Canada and Canadians visiting America, gives tourists a favorable impression of Idaho. In coming years, visitors will get an even more favorable impression because this spring the Idaho Transportation Department approved a \$1 million grant to build a visitor's center in Bonners Ferry. The International Gateway Visitors Center, which will provide information about the area and access to restrooms and utilities, is slated to open by the summer of 2004. The center may display some Kootenai Tribe artifacts.

- Idaho's first Foreign Trade Zone has been established in Boundary County at Eastport, one of the two U.S. Custom Ports of Entry on the Canadian border in Idaho. Businesses operating at Foreign Trade Zones enjoy increased speed of international trade due to faster customs inspections and reduced or waived duties, tariffs, and quota limits. The Foreign Trade Zone designation should make it easier for Boundary County to attract companies.

Kootenai County

- Flexcel, formerly Harpers, permanently laid off 60 workers in April. The continued sluggishness of the U.S. economy forced the office furniture manufacturing plant to eliminate the factory floor jobs. After the layoff, Flexcel employs 440 people, remaining the Panhandle's largest manufacturing operation at a single site.
- The University of Idaho Research Park (UIRP) in Post Falls recently welcomed a new tenant, Electrodyne. The company develops multimedia CDs and DVDs to market other companies. Currently, Electrodyne employs four people at the UIRP. It is developing new products that may lead to expansion. With Electrodyne's occupancy, the park's first building is full. Plans are underway for construction of a second building.
- Flooring Sales Group, a company with 15 stores in Washington and Idaho, is moving its corporate headquarters to a landmark in downtown Coeur d'Alene, the Masonic Temple building at 524 East Sherman Avenue. The company's Great Floors stores sell carpets, vinyl, laminate, wood, tile, and stone flooring. About 25 administrative employees will move into the headquarters in the next two months. Some are moving from the Seattle area and some from the Great Floors store at Highway 95 and Dalton Avenue in Coeur d'Alene. Founded in Coeur d'Alene in 1970, Flooring Sales Groups employs about 325 employees. It plans to add one or two stores a year.
- Verizon offered voluntary separation packages in May to 60 employees at its national order market center (NOMC), its first and largest call center in Coeur d'Alene. It's not yet known how many employees will accept the separation package. The sluggish U.S. economy, intense competition in the wireless communications industry, and changes in technology that allow the average worker to process more orders per day have decreased the need for Verizon NOMC employees throughout the U.S. The offer of voluntary separation does not necessarily mean involuntary layoffs will follow at the Coeur d'Alene NOMC, which currently employs 180 workers. Verizon's other order-processing center in Coeur d'Alene employs 60 workers.
- Imco Recycling laid off 25 people in April—half of the workforce at the aluminum recycling plant near Hauser. Two years ago, it employed about 75 people. Low aluminum prices and high energy costs have forced several Northwest aluminum mills to close during the last two years. As well as recycling cans, Imco recycles dross and other byproducts of aluminum production. Before Kaiser Aluminum eliminated most of

its operations in neighboring Spokane County, Imco sent its product to Kaiser as molten liquid for rolling into aluminum sheets. The loss of Kaiser, along with reduced demand for aluminum, played a role in Imco's layoff.

- The Emporium store at the Silver Lake Mall in Coeur d'Alene closed in April, putting 46 employees out of work. Troutman Investment had announced in January it would close 34 Emporium department stores, including the one in Coeur d'Alene, within three months.
- MediServe moved from 404 West Haycraft into its new 6,400-square-foot building at 6796 North Mineral Drive in Coeur d'Alene in May. MediServe provides billing services and financial consulting for medical offices in Idaho, Montana, Wyoming, and Washington. The new building will allow MediServe to continue to expand. Nine years ago, it started with eight employees. Today, it employs more than 30 people.
- C. Paul Sandifur, president and CEO of Spokane-based Metropolitan Mortgages & Securities Co., announced in October that he planned to bring 50 jobs to Kootenai County. In February, Metropolitan celebrated the grand opening of its 12,000-square-foot office at Riverbend Commerce Park in Post Falls. It now employs more than 40 people there.
- In March, four anchor tenants moved into the new mini-mall north of Olive Garden along Highway 95 in Coeur d'Alene. Tenants include: Borders Books, a 15,000-square-foot store selling books, music, and movies; T.J. Maxx, a 23,000-square-foot store selling clothing and accessories; Bed, Bath, & Beyond, a 30,000-square-foot store selling home furniture and accessories; and Petco, a 12,000-square-foot store selling supplies and services for pets. Together, they hired about 150 people. In May, Pier 1 Imports began hiring two dozen people for its new 10,000-square-foot store in the mini-mall.
- Dollar Tree Stores, a discount chain, opened two stores: a 12,000-square-foot store employing 15 people at 720 North Cecil Road near Wal-Mart in Post Falls in April, and a 20,000-square-foot store employing 20 people in the former United Furniture Warehouse at U.S. 95 and Neider Avenue in Coeur d'Alene in May.

Shoshone County

- The Galena Mine, the only Silver Valley mine operating near capacity, produced a record 5.3 million ounces of silver in 2002. The mine, employing more than 200 people near Osburn, may surpass that record this year.

Kathryn Tacke, Regional Labor Economist
 1221 W. Ironwood Drive, Coeur d'Alene, ID 83814
 (208) 769-1558 ext. 340
 E-mail: ktacke@jobservice.us



SEAPORT

NORTH CENTRAL IDAHO: CLEARWATER, IDAHO, LATAH, LEWIS, & NEZ PERCE COUNTIES

EMPLOYMENT TRENDS

In March, Seaport's *Nonfarm Payroll Jobs* decreased by 230 jobs from February 2003. A decrease of 170 jobs was recorded over the year since March 2002. *Educational & Health Services* and *Government Administration* were the only industries to show job increases since February 2003. A closer look at these industries reveals that *Health Services* continues to grow because people are staying closer to home for health care. In the past, local residents have used Spokane hospitals and clinics for some health care needs. As local hospitals and clinics add services they are capturing more of the market. Year-over-year *Health Services* has increased more than any other Seaport industry. In addition to *Health Services*, *Government Administration* showed more jobs in March compared to February. The increase in this industry occurred as the public sector hired employees for road and construction work. In year-over-year comparisons, job decreases occurred in almost all industries, except *Manufacturing*, which posted a significant increase year-over-year. An analysis of this industry shows only one sector in *Manufacturing* has increased—*Other Manufacturing*—which has been creating jobs mostly in the manufacture of ammunition and water craft. This sector is outside of the traditional *Wood Products*, *Paper Products*, and *Food Processing* sectors, and is expected to increase in the future.

SPECIAL TOPIC: Population

The population in North Central Idaho decreased .6 percent between 2000 and 2002, according to recently released data by the U.S. Bureau of Census. Population for the state increased by 3.2 percent from 2000 to 2002, as shown in Seaport Table 2. Four of the five counties in North Central Idaho (Clearwater, Idaho, Lewis, and Nez Perce), lost ground when compared to population growth in the other 39 counties of Idaho. Clearwater County lost the most population in the region, decreasing by

Seaport Table 1: Labor Force & Employment
Nez Perce County, Idaho and Asotin County, Washington

	March 2003*	Feb 2003	March 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	36,370	36,610	34,760	-0.7	4.6
Unemployment	1,430	1,400	1,470	2.1	-2.7
% of Labor Force Unemployed	3.9	3.8	4.2		
Total Employment	34,940	35,210	33,290	-0.8	5.0
Unadjusted					
Civilian Labor Force	36,520	36,730	34,990	-0.6	4.4
Unemployment	1,710	1,820	1,760	-6.0	-2.8
% of Labor Force Unemployed	4.7	5.0	5.0		
Total Employment	34,810	34,910	33,230	-0.3	4.8
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	26,530	26,760	26,700	-0.9	-0.6
Goods-Producing Industries	4,320	4,390	4,200	-1.6	2.9
Natural Resources & Mining	220	220	190	0.0	15.8
Construction	920	920	900	0.0	2.2
Manufacturing	3,180	3,250	3,110	-2.2	2.3
Wood Product Manufacturing	560	560	560	0.0	0.0
Food Manufacturing	80	90	80	-11.1	0.0
Paper Manufacturing	1,210	1,210	1,200	0.0	0.8
Other Manufacturing	1,330	1,390	1,270	-4.3	4.7
Service-Producing Industries	22,210	22,370	22,500	-0.7	-1.3
Trade, Transportation & Utilities	5,740	5,890	5,820	-2.5	-1.4
Wholesale Trade	620	620	600	0.0	3.3
Retail Trade	3,900	3,980	3,940	-2.0	-1.0
Utilities	80	80	90	0.0	-11.1
Transportation & Warehousing	1,140	1,210	1,190	-5.8	-4.2
Information	360	360	370	0.0	-2.7
Financial Activities	1,770	1,810	1,790	-2.2	-1.1
Professional & Business Services	1,490	1,530	1,540	-2.6	-3.2
Education & Health Services	3,860	3,800	3,980	1.6	-3.0
Leisure & Hospitality	2,550	2,570	2,650	-0.8	-3.8
Other Services	1,190	1,190	1,180	0.0	0.8
Government Education	2,480	2,480	2,500	0.0	-0.8
Government Administration	1,880	1,850	1,840	1.6	2.2
Government Tribes	890	890	830	0.0	7.2

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

Seaport Table 2: Population Estimates 2000-2002

	Population 2000	Population 2001	Population 2002	Percent Change		
				2001- 2002	2000- 2001	2000- 2002
United States	282,224,348	285,317,559	288,368,698	1.1	1.1	2.2
Idaho	1,299,721	1,320,585	1,341,131	1.6	1.6	3.2
Clearwater County	8,892	8,608	8,446	-1.9	-3.2	-5.0
Idaho County	15,469	15,395	15,308	-0.6	-0.5	-1.0
Latah County	34,887	35,154	35,218	0.2	0.8	0.9
Lewis County	3,746	3,626	3,721	2.6	-3.2	-0.7
Nez Perce County	37,380	37,019	37,106	0.2	-1.0	-0.7
Asotin (Wa.)	20,453	20,446	20,559	0.6	0.0	0.5

SOURCE: Population Estimates Branch, U.S. Census Bureau, April 17, 2003

5.0 percent from 2000 to 2002. The region's economic engine, Nez Perce County, decreased in population by 0.7 percent, far below increases generated in other Idaho economic engines, such as Canyon County (10.3 percent increase), or in Ada County (6.2 percent increase). Latah County has the distinction of being the fastest growing county in North Central Idaho, though the increase was only 0.9 percent over two years. High unemployment, sawmill closures, and U.S. Forest Service cutbacks produced weak population growth in Clearwater, Lewis, and Idaho Counties. By far, North Central Idaho as a whole has not participated in the strong population growth experienced by other regions in the state. See FYI Table 7 on page 28 for population changes of all Idaho counties.

AREA DEVELOPMENTS

Clearwater County

- Orofino's new business park building is completely leased even before the building is finished. The \$2 million building is being constructed with state and federal money, and is expected to be finished July 1. The first company to sign a lease, Architectural Signs and Engraving Inc. (ASE), specializes in producing American With Disabilities Act signs and other specialty signs. The locally owned company has customers throughout the United States. ASE and the City of Orofino have been working together the past two years in an effort to meet ASE's expansion needs. The company will occupy half of the 30,000-square-foot building. The second tenant, Plumber One, Inc., has signed a lease for the other half of the building. The company produces earthquake safety valves that cut off the flow of natural gas and propane to homes and businesses during unexpected ground movements that exceed 5.2 on the Richter scale. The factory in Orofino will also be making custom safety valves for commercial use on tanks holding ammonia, chlorine, and other hazardous gases. The company expects to hire 100 to 150 employees. Idaho Governor Dirk Kempthorne has committed \$300,000 in Idaho Workforce Development Training Funds to train local workers for Plumber One, Inc. The new tenants are a welcome addition to Clearwater County, which has been hit hard by the downturn in the resource economy. Potlatch Corp. closed a plywood mill in Weippe in the county in 2000, forcing about 200 people out of work. Since then the county's unemployment rate has been among the highest in the state. Starting wages for the jobs at Plumber One will be \$7.00 an hour, plus medical and dental benefits.

Idaho & Lewis Counties

- The Idaho Fish and Game Commission has approved a spring Chinook salmon season on the upper Clearwater River. The approved season is expected to attract people from all over to fish for the

ocean-going salmon, and could bring a significant amount of money to Kooskia and Kamiah merchants. The Idaho Fish and Game Department approval was based on the strength of the salmon run, which is one of the best in years. Anglers will be able to keep two hatchery salmon per day and 10 for the entire season. According to a report by the Idaho Fish and Wildlife Foundation, the 2002 salmon season was worth \$90 million to the Idaho economy, which resulted in more than \$3 million in spending in Kooskia. The town of Riggins benefited the most with \$10.1 million in direct spending by individuals because of fishing.

Latah County

- Internationally renowned architect Cesar Pelli has revealed his initial vision of the new Lionel Hampton Center Performance and Education Facility at the University of Idaho (UI) campus. "This has been a particularly enjoyable project," said Pelli, an Argentinean-born architect who counts among his award-winning projects the Pacific Design Center in Los Angeles and the United States Embassy in Tokyo. Designs are still in the preliminary stage, Pelli said, but the final building is expected to be a showpiece and tribute to a distinctly American style of music. "If this jazz center really takes hold, in 20 years they won't just think of Chicago and New York when they think of jazz, they will think of Moscow," Pelli said. And with just about \$4 million in the center account, university fundraisers are banking on that excitement to drum up additional donations. The Lionel Hampton Center, which includes the Lionel Hampton School of Music, the Jazz Festival, the International Jazz Collections, and the education and performance facility, needs to raise \$60 million in state, federal, and private funds. About \$40 million will be used for the building. The remaining money will be used for building maintenance and care for the 110,000 pieces of memorabilia in the jazz collections. The UI has raised \$1 million in seed money from a U.S. Housing and Urban Development grant, \$1.4 million in federal funding earmarked for the jazz archive, and about \$2.1 million in private donations. According to officials the UI is still on track to meet its goal of completing the building by 2006.

Nez Perce County

- A medical building could become the first tenant of the Port of Lewiston's business and technology park. The port is negotiating with doctors who have not yet been identified. The 10,000-square-foot, single-story surgical center would be built on a 1.5-acre site with 51 parking spaces near the Royal Plaza Retirement and Care Center on Juniper Drive. It may

Continued on page 30



TREASURE VALLEY

ADA, ADAMS, BOISE, CANYON, ELMORE, GEM, OWYHEE, PAYETTE, VALLEY, & WASHINGTON COUNTIES

EMPLOYMENT TRENDS

The Boise City Metropolitan Statistical Area's (MSA) average annual unemployment rate for March 2003 was 5.6 percent, as shown in Treasure Valley Table 1. This was five-tenths of a percentage point above the February 2003 rate of 5.1 percent and three-tenths of a percentage point above the March 2002 rate of 5.3 percent. Month-over-month, the number of employed persons decreased by 600, or 0.3 percent, from February 2003, and the number of unemployed individuals increased by 1,300 individuals, or 10.4 percent. The decreasing number of persons employed and the increasing number of persons unemployed created an overall increase of 700 individuals, or 0.3 percent, in the *Civilian Labor Force* from February 2003. Year-over-year, the number of employed persons has decreased by 3,400, or 1.4 percent, and the number of unemployed individuals decreased by 500 individuals, or 3.8 percent, creating a net decrease in the *Civilian Labor Force* of 2,900 individuals from March 2002. The *Civilian Labor Force* figures for March 2003 for all ten counties in Southwest Idaho are shown in Treasure Valley Table 2.

**Treasure Valley Table 2: March 2003
Seasonally Adjusted Labor Force Figures for
Southwest Idaho Counties**

	Civilian Labor Force	Number Unem- ployed	Percent Unem- ployed	Number Employed
Ada	178,499	9,062	5.1	169,437
Adams	1,808	212	11.7	1,596
Boise	2,703	160	5.9	2,543
Canyon	69,733	4,760	6.8	64,973
Elmore	9,943	705	7.1	9,237
Gem	6,112	474	7.8	5,638
Owyhee	4,033	110	2.7	3,922
Payette	9,908	847	8.5	9,061
Valley	4,081	360	8.8	3,721
Washington	4,338	398	9.2	3,941
Statewide	694,709	38,166	5.5	656,543

**Treasure Valley Table 1: Boise MSA Labor Force & Employment
Ada and Canyon Counties**

	March 2003*	Feb 2003	March 2002	% Change Last Month	% Change Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	248,200	247,500	251,100	0.3	-1.2
Unemployment	13,800	12,500	13,300	10.4	3.8
% of Labor Force Unemployed	5.6	5.1	5.3		
Total Employment	234,400	235,000	237,800	-0.3	-1.4
<i>Unadjusted</i>					
Civilian Labor Force	247,600	246,100	250,200	0.6	-1.0
Unemployment	14,400	14,400	14,000	0.0	2.9
% of Labor Force Unemployed	5.8	5.9	5.6		
Total Employment	233,200	231,700	236,200	0.6	-1.3
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	224,200	223,100	224,200	0.5	0.0
GOODS-PRODUCING INDUSTRIES	44,200	44,800	45,000	-1.3	-1.8
<i>Natural Resources & Construction</i>	14,400	14,200	13,900	1.4	3.6
<i>Manufacturing</i>	29,800	30,600	31,100	-2.6	-4.2
Durable Goods	23,000	23,900	24,200	-3.8	-5.0
Wood Product Manufacturing	1,800	1,700	1,800	5.9	0.0
Fabricated Metal Products Mfg.	1,400	1,400	1,400	0.0	0.0
Machinery Manufacturing	1,400	1,400	1,400	0.0	0.0
Computer & Electronic Manufacturing	14,200	15,200	16,100	-6.6	-11.8
Transportation Equipment Mfg.	1,600	1,600	1,600	0.0	0.0
Other Durable Goods	2,600	2,600	1,900	0.0	36.8
Nondurable Goods	6,800	6,700	6,900	1.5	-1.4
Food Manufacturing	5,100	5,000	5,100	2.0	0.0
Printing & Related Support Activities	700	700	800	0.0	-12.5
Other Nondurable Goods	1,000	1,000	1,000	0.0	0.0
SERVICE-PRODUCING INDUSTRIES	180,000	178,300	179,200	1.0	0.4
<i>Trade, Transportation, & Utilities</i>	43,200	43,100	43,600	0.2	-0.9
Trade	36,400	36,200	36,700	0.6	-0.8
Wholesale Trade	10,400	10,200	10,100	2.0	3.0
Wholesalers, Durable Goods	6,600	6,400	6,200	3.1	6.5
Wholesalers, Nondurable Goods	2,900	2,900	3,000	0.0	-3.3
Retail Trade	26,000	26,000	26,600	0.0	-2.3
Food & Beverage Stores	4,000	4,000	4,100	0.0	-2.4
General Merchandise Stores	5,500	5,400	5,700	1.9	-3.5
All Other Retail Trade	16,500	16,600	16,800	-0.6	-1.8
Transportation, Warehousing, & Utilities	6,800	6,900	6,900	-1.4	-1.4
Utilities	700	700	700	0.0	0.0
Transportation & Warehousing	6,100	6,200	6,200	-1.6	-1.6
<i>Information</i>	3,500	3,500	3,700	0.0	-5.4
Telecommunications	1,400	1,400	1,300	0.0	7.7
<i>Financial Activities</i>	12,100	12,000	11,800	0.8	2.5
Finance & Insurance	9,100	9,000	8,800	1.1	3.4
Real Estate & Rental & Leasing	3,000	3,000	3,000	0.0	0.0
<i>Professional & Business Services</i>	31,400	30,700	31,300	2.3	0.3
Professional, Scientific, & Technical	9,800	9,800	10,000	0.0	-2.0
Management of Companies & Ent.	6,800	6,700	7,000	1.5	-2.9
Administrative & Support & Waste Mgmt.	14,800	14,200	14,300	4.2	3.5
<i>Educational & Health Services</i>	27,400	27,200	26,700	0.7	2.6
Educational Services	2,100	2,000	2,300	5.0	-8.7
Health Care & Social Assistance	25,300	25,200	24,400	0.4	3.7
Hospitals	8,900	8,800	9,000	1.1	-1.1
<i>Leisure & Hospitality</i>	19,200	18,900	19,000	1.6	1.1
Arts, Entertainment, & Recreation	2,300	2,200	2,000	4.5	15.0
Accommodation & Food Services	16,900	16,700	17,000	1.2	-0.6
Accommodation	1,900	1,900	2,000	0.0	-5.0
Food Services & Drinking Places	14,900	14,800	15,000	0.7	-0.7
Other Services	6,600	6,600	6,900	0.0	-4.3
<i>Total Government</i>	36,600	36,300	36,200	0.8	1.1
Federal Government	5,300	5,200	5,100	1.9	3.9
State & Local Government	31,300	31,100	31,100	0.6	0.6
State Government	13,700	13,600	13,500	0.7	1.5
State Government Education	4,300	4,200	4,500	2.4	-4.4
State Government Administration	9,400	9,400	9,000	0.0	4.4
Local Government	17,600	17,500	17,600	0.6	0.0
Local Government Education	10,300	10,100	10,600	2.0	-2.8
Local Government Administration	7,300	7,400	7,000	-1.4	4.3

* Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

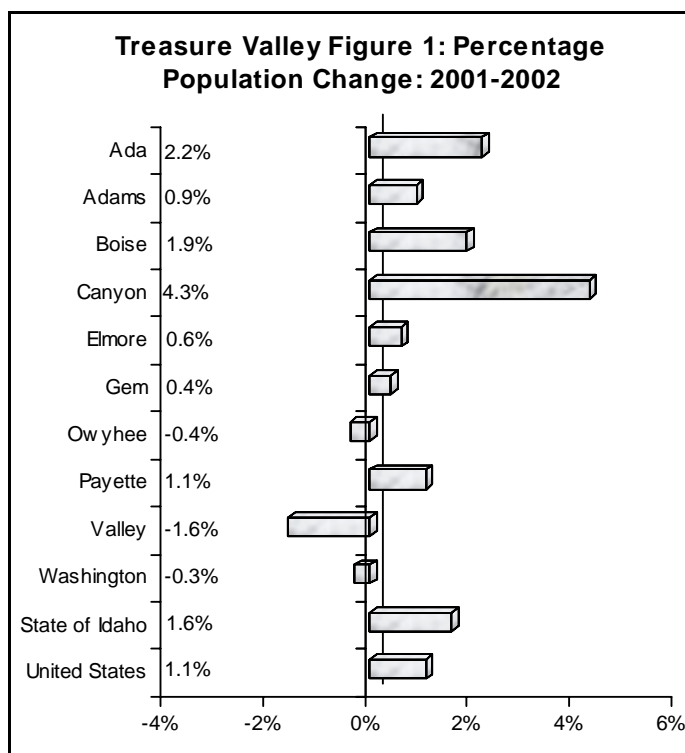
In the Boise City MSA *Nonfarm Payroll Jobs* increased by 1,100, or 0.5 percent, from February 2003 to March 2003, while over the year, *Nonfarm Payroll Jobs* remained stable at 224,200 jobs in the Boise City MSA. Month-over-month, *Goods-Producing Industries* lost 600 jobs; job decreases were noted in *Computer & Electronic Equipment Manufacturing* (-1,000 jobs), while job gains were noted in *Natural Resources & Construction* (200 jobs), *Wood Product Manufacturing* (100 jobs), and *Food Manufacturing* (100 jobs). Year-over-year, *Goods-Producing Industries* lost 800 jobs, with *Natural Resources & Construction* (500 jobs) and *Other Durable Goods Manufacturing* (700 jobs) the only industries to experience job gains. Job losses occurred in *Computer & Electronic Product Manufacturing* (-1,900 jobs) and *Printing and Related Support Activities Manufacturing* (-100 jobs).

In *Service-Producing Industries*, job gains outweighed jobs lost as 1,700 jobs were added from February to March 2003. Job gains were experienced in *Wholesale Durable Goods Trade* (200 jobs), *General Merchandise Stores* (100 jobs), *Finance & Insurance Services* (100 jobs), *Management of Companies & Enterprises* (100 jobs), *Administrative & Support & Waste Management Services* (600 jobs), *Educational Services* (100 jobs), *Health Care & Social Assistance Services* (100 jobs), *Arts, Entertainment, & Recreation Services* (100 jobs), *Food Services & Drinking Places* (100 jobs), *Federal Government* (100 jobs), *State Government Education* (100 jobs), and *Local Government Education* (200 jobs). Job losses were noted in *All Other Retail Trade* (-100 jobs), *Transportation & Warehousing Services* (-100 jobs), and *Local Government Administration* (-100 jobs). Year-over-year, *Service-Producing Industries* gained 800 jobs, with job losses noted in *Nondurable Goods Wholesale Trade* (-100 jobs), *Food & Beverage Stores* (-100 jobs), *General Merchandise Stores* (-200 jobs), *All Other Retail Trade* (-300 jobs), *Transportation & Warehousing Services* (-100 jobs), *Information Services* (-200 jobs), *Professional, Scientific, & Technical Services* (-200 jobs), *Management of Companies & Enterprises Services* (-200 jobs), *Educational Services* (-200 jobs), *Hospital Services* (-100 jobs), *Accommodation Services* (-100 jobs), *Food Services & Drinking Places* (-100 jobs), *Other Services* (-300 jobs), *State Government Education* (-200 jobs), and *Local Government Education* (-300 jobs). Job gains were noted in *Durable Goods Wholesale Trade* (400 jobs), *Telecommunications Services* (100 jobs), *Finance & Insurance Services* (300 jobs), *Administrative & Support & Waste Management Services* (500 jobs), *Health Care & Social Assistance Services* (900 jobs), *Arts, Entertainment, & Recreation Services* (300 jobs), *Federal Government* (200 jobs), *State Government Administration* (400 jobs), and *Local Government Administration* (300 jobs). The slow growth of jobs over

the year is consistent with the downturn and slow recovery that the national economy has been experiencing since January 2001.

SPECIAL TOPIC: 2002 Population Update

The U.S. Census Bureau recently released the 2002 population data. Treasure Valley Figure 1 illustrates the percent change in population for all ten Southwest Idaho counties from 2001 to 2002; the FYI section at the end of this newsletter (pages 27-28) shows the population data for 2000 through 2002 for all Idaho counties. Owyhee, Valley, and Washington Counties all experienced a loss in population over the year, while the seven other Southwest Idaho counties experienced population gains. Ada County gained 6,848 residents over the year, or 2.2 percent; Adams County gained 30 residents, or 0.9 percent; Boise County gained 131 residents, or 1.9 percent; Canyon County gained 5,979 residents, or 4.3 percent; Elmore County gained 173 residents, or 0.6 percent; Gem County gained 69 residents, or 0.4 percent; Owyhee County lost 47 residents, or 0.4 percent; Payette County gained 227 residents, or 1.1 percent; Valley County lost 122 residents, or 1.6 percent; and Washington County lost 25 residents, or 0.3 percent over the year. The state of Idaho gained 20,546 residents over the year, or 1.6 percent, with 64.6 percent of the new individuals residing in Southwest Idaho; as of July 1, 2002, 49.9 percent of Idaho residents live in Southwest Idaho. In comparison with counties across the nation, Canyon County ranked number 56 on the list of 100 fastest growing counties in the country.



AREA DEVELOPMENTS

Boise City MSA

- Eddy's Bakery announced in late March that it would close its production facility in west Boise in May. The bakery's parent company, Interstate Bakeries Corp. (IBC), is shifting production to Nevada. The closure left 129 employees without jobs. While production workers lost their jobs, the drivers will continue to work for IBC. Officials for IBC stated that the Boise facility is less efficient than other facilities, and the company was moving all lines to the most efficient production facilities.
- Washington Group International (WGI) received a \$1.05 billion contract to participate in a portion of the cleanup at the U.S. Department of Energy's Hanford site in Washington. The contract requires WGI to clean up a 210-square-mile area starting at the bank of the Columbia River and extending inland to the Central Plateau on the Hanford Site. WGI was also awarded a contract by the U.S. Army Corps of Engineers for future work in Iraq, Afghanistan, and other areas. WGI shares this contract with three other companies.
- The Boise School District announced in early April that it would cut 78 positions during the next school year as a result of the budget shortfall. About half of the jobs will be eliminated through attrition; the other half could be made through layoffs.
- Old Boise, a commercial development group, purchased the Turnverein Building at the corner of Sixth and Main Streets in Boise and plans to open China Blue—an upscale music and dance venue—on the main floor, a private club on the mezzanine level, and a lower-level nightclub. The club has a tentative June 16 opening date.
- The Boys and Girls Club opened in Meridian on April 21. A ribbon cutting ceremony was held at the new club, located in the former Meridian police station. The club offers recreational and educational programs as well as a safe place for hundreds of kids to spend time each day. The club is open from 3:00 p.m. to 8:00 p.m. on weekdays.
- The Idaho Athletic Club (IAC) announced that it would open a new facility in Meridian in the Blackeagle Center at Blackeagle Drive and Maple Grove. Construction is scheduled to begin this summer after IAC gets approval from the city; IAC hopes to open the club in early 2004.
- Developers of Lowe's Home Improvement centers are looking at a space in Nampa to open a new store, although Lowe's officials would not confirm the information.
- Les Schwab started construction on a new full service tire station in Nampa. The retail and service center will be located on 12th Avenue Road near Greenhurst in Nampa. The new center will employ about 15 employees and is scheduled to open August 1.
- Plexus Corp. (formerly MCMS) announced that it would lay off 400 employees and close its Kentucky plant. Company officials stated that the majority of jobs would be lost at the Kentucky facility and that the Nampa facility should not be affected.
- The annual Mercy Community Sale in April raised over \$100,000. The money from the sale is used to support activities of the Boys and Girls Club, baseball and basketball programs at the Nampa Recreation Center, after-school homework clubs, and hundreds of other youth programs. About 25 percent of the money will be donated to the Nampa Schools Foundation, which provides grants for individual teachers in local schools to use for school projects.
- The Hispanic Cultural Center of Idaho is nearing completion in Nampa. The 30,000-square-foot facility will feature a museum, lecture hall, conference room, classrooms, computer lab, teaching kitchen, bilingual library, and gift shop. The center is scheduled to open July 1.
- Renovations started on the Caldwell Depot in April. The first project is a new roof. The \$20,000 project is funded by Caldwell Urban Renewal Agency funds. Other projects related to the renovation are waiting for funding. Final plans for the depot include restoring the interior and exterior so the space can be used for receptions, conferences, and meetings.
- Treasure Valley Community College opened a satellite campus in Caldwell. The 2,500-square-foot campus opened to classes on March 31, and had nearly 200 students enrolled.
- Terry Reilly Health Services opened its newest facility in Melba. The 3,500-square-foot medical and dental clinic replaces the rented space that the clinic was using for the past 10 months. Terry Reilly Health Services offers a variety of health and dental services using a sliding fee based on family income levels.

- Other recent business openings in the Boise City MSA include Country Care Assisted Living at Doves Landing Center (Guardian Home Care) in Nampa, Hong Kong Lounge in south Nampa, Starting Line Car Wash and Brew Crew Espresso in Nampa, Goodwill Thrift Store and Donation Center in Nampa, Shiny Nails in Nampa, St. Luke's Idaho Elks Rehabilitation Center in Nampa, Treasure Valley Engineers in Nampa, and a new Johnny Carino's restaurant in Meridian. Elliott's Sports Pub opened in the former Champion's space in Nampa.
- Other recent business events in the Boise City MSA include: the ground breaking of a 39-condo development at the corner of 13th and Fort Streets in downtown Boise; an open house at Health-South Treasure Valley Hospital to showcase its new open MRI equipment; an announcement that Big Lots plans to open a new store in Meridian; the relocation of MotoSports to a new, larger location on Overland Road in Boise; the relocation of the Caldwell Chamber of Commerce and the Caldwell Economic Development Council to their new home in Caldwell; the start of construction on a new D.L. Evans Bank branch in Boise; start of construction on a new 40,000-square-foot building for Intermountain Wood Products Inc., which has made plans to move its Treasure Valley distribution center to the new building in Meridian; and the opening of Kat's House of Blues in a former carpet store in downtown Nampa. Closures in the area include all three Boise City MSA Emporium retail stores, and Under the Onion, Guiseppe's, and Paisanos restaurants in Meridian.

Boise County

- Bogus Basin Ski Resort closed in early April. The resort held a "Bogus Beach Bash" to commemorate the closing. An outdoor barbeque and a band performed live music for the event. Bogus Basin has announced that the lack of snow, the late start for the 2002-2003 skiing season, and a wet January caused nearly 50 percent less skier and snowboarder visits, which resulted in a \$1.7 million deficit for the season.

Elmore County

- The Mountain Home School District received a three-year grant in late April from the federal government, administered by the Idaho Department of Education, to help improve reading skills for students. The \$655,500 Reading First grant will be used for students in kindergarten through third grade. The money will be used to pay for

two reading coaches for schools, special training for current teachers, and the purchase of curriculum materials.

Gem County

- Recent business events in Gem County include the replacement of windows at Emmett Junior High School, a ground-breaking at Walter Knox Memorial Hospital for a new helipad in late March, and the opening of the new Gem County jail in mid-May.

Payette County

- Sunseeds, a company specializing in the development of hybrid vegetable seeds and seed technology, started construction in early April on a new facility in southern Payette County. The company is moving its administrative operations to Payette County from Southern California, and this will be the first time that the 100-plus-year-old company will have all operations under one roof. The expansion will add between 60 and 75 new jobs to the area.
- Countryside Manor/XL Hospice in Payette had its grand opening in late April, which included a ribbon-cutting ceremony and an open house.

Valley County

- In early April, the Idaho Senate unanimously passed a bill to grant the Tamarack Resort developers an extension of their lease of state land. The lease was extended from 10 to 49 years, which was crucial for developers of Tamarack to secure additional financing for the project. The project is scheduled to start construction this summer with three chair lifts, an 18-hole golf course, a lodge, and full utilities for 60 residential lots and 20 townhouses. Tamarack officials also announced that the resort would open its hills for skiing during the 2003-2004 season.
- Brundage Ski Resort ended its 2002-2003 season on April 13. This season posted a record number of visits. Skier visits totaled 114,099 during the season, which was up 4.5 percent from the previous year; it also posted the largest numbers in the resort's 42-year history.

Jennifer Pirtle, Regional Labor Economist
 205 E. Watertower Lane, Meridian, ID 83642
 (208) 364-7785, ext. 3599
 E-mail: jpirtle@jobservice.us



MAGIC VALLEY

BLAINE, CAMAS, CASSIA, GOODING, JEROME, LINCOLN, MINIDOKA, & TWIN FALLS COUNTIES

EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate in the Magic Valley Labor Market Area (LMA) was 4.0 percent in March 2003 as shown in Magic Valley Table 1. This was one-tenth of a percentage point less than February 2003 and nine-tenths of a percentage point less than March 2002. The number of unemployed persons decreased by 380 year-over-year and the *Civilian Labor Force* increased by 1,840 persons.

Nonfarm Payroll Jobs showed a strong increase of 8.7 percent year-over-year. This translates into 3,230 new jobs created from 2002 to 2003. Sectors that showed strong increases were *Construction* (51.6 percent), *Food Manufacturing* (22.2 percent), *Utilities* (16.7 percent), *Professional & Business Services* (28.9 percent), *Leisure & Hospitality* (9.9 percent), and *Other Services* (11.2 percent). The *Food Manufacturing* numbers are somewhat misleading because they reflect the transfer of several temporary workers into permanent status in many plants in western Magic Valley. It is important to remember that the Magic Valley LMA is comprised of Twin Falls, Jerome, and Gooding Counties, so these figures do not include the Mini-Cassia area where several hundred workers face layoffs. A somewhat surprising figure is the increase in *Construction* year-over-year. However, some new heavy construction projects were beginning and new housing starts have occurred at a record pace in the City of Twin Falls. Inclement weather in March 2002 caused construction delays, which are reflected in the year-ago numbers. Strong construction numbers are expected to continue due to the building of several new retail sites slated for 2003.

Magic Valley Table 1: Labor Force & Employment
Twin Falls, Jerome, and Gooding Counties

	March 2003*	Feb 2003	March 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	52,360	52,590	50,520	52,360	52,590
Unemployment	2,100	2,130	2,480	2,100	2,130
% of Labor Force Unemployed	4.0	4.1	4.9		
Total Employment	50,260	50,460	48,040	50,260	50,460
Unadjusted					
Civilian Labor Force	51,430	51,320	49,290	0.2	4.3
Unemployment	2,320	2,640	2,690	-12.1	-13.8
% of Labor Force Unemployed	4.5	5.1	5.5		
Total Employment	49,110	48,680	46,610	0.9	5.4
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	40,420	40,120	37,190	0.7	8.7
Goods-Producing Industries	8,090	7,900	6,510	2.4	24.3
Natural Resources & Mining	30	30	40	0.0	-25.0
Construction	2,350	2,250	1,550	4.4	51.6
Manufacturing	5,700	5,610	4,920	1.6	15.9
Food Manufacturing	3,850	3,680	3,150	4.6	22.2
Other Manufacturing	1,860	1,930	1,770	-3.6	5.1
Service-Producing Industries	32,340	32,230	30,680	0.3	5.4
Trade, Transportation & Utilities	9,680	9,810	9,530	-1.3	1.6
Wholesale Trade	1,880	1,850	1,750	1.6	7.4
Retail Trade	5,710	5,800	5,530	-1.6	3.3
Utilities	210	210	180	0.0	16.7
Transportation & Warehousing	1,880	1,940	2,070	-3.1	-9.2
Information	470	500	480	-6.0	-2.1
Financial Activities	1,690	1,680	1,540	0.6	9.7
Professional & Business Services	5,080	5,080	3,940	0.0	28.9
Educational & Health Services	3,060	3,070	2,960	-0.3	3.4
Leisure & Hospitality	3,430	3,450	3,120	-0.6	9.9
Other Services	1,490	1,490	1,340	0.0	11.2
Government Education	3,320	3,030	3,900	9.6	-14.9
Government Administration	4,130	4,130	3,880	0.0	6.4

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

Sectors that showed significant decreases include *Natural Resources & Mining* (25 percent), *Transportation* (9.2 percent), *Information* (2.1 percent), and *Government Education* (14.9 percent). *Transportation* has been significantly affected by high gasoline prices caused by market uncertainty during the war with Iraq. That trend is expected to continue until petroleum prices drop. *Government Education* will continue to be an uncertain sector until the state economy and revenues improve.

In summary, the Magic Valley LMA continues to perform surprisingly well, and 2002 was a good year despite statewide recessionary pressure. The *Civilian Labor Force* remains solid and the unemployment rate is better than in most areas of the state. Job growth has been rapid. The outlook for 2003 is more optimistic than originally thought earlier

in the year. At least two large retail employers are either constructing new buildings or will open in 2003, creating 200-300 new retail jobs. The water outlook has improved dramatically with excellent April rains and farmers should have their normal crop options. Commodities are down, especially milk prices and potato prices, but it should be a fairly average year in that sector. The ending of the war with Iraq should remove some of the caution seen in business hiring. All in all, the outlook for the Magic Valley in 2003 is cautiously optimistic.

SPECIAL TOPIC: Population—The Overlooked Economic Indicator

Though many people may not consider population to be an economic indicator, it is. Uncontrolled and unmanaged population growth can be detrimental to an area. However, sustained and steady population growth can be an indicator of economic health. The U.S. Census Bureau's recently released population figures, which show the change in population from 2000 to 2002, provides an interesting indication of the economic condition of South Central Idaho (see Magic Valley Table 2).

Blaine and Camas County in the north part of the region have experienced the largest percentage increase in population growth at 7.3 percent and 4.6 percent, respectively. Blaine County has had an influx of 1,387 people over the last two years. This is a concern because most of the in-migration has consisted of primarily part-time residents building high cost homes. While this is good for the property tax base, the county had limited land area and traffic gridlock has become a serious problem, especially between Ketchum and Hailey. Also, such building consumes land that might be used for affordable housing. The lack of affordable housing has caused severe labor shortages in the service sectors because these occupations do not pay enough for workers to live in the area, which has one of the highest cost of living rates in Idaho. Controlled population growth will be an area of concern for Blaine County.

Twin Falls, Gooding, Jerome, and Lincoln Counties have experienced moderate growth in the last two years. In the decade of the 1990's, Gooding and Jerome Counties experienced exceptional growth due to the expansion of the dairy industry. While growth is still occurring, it is at a much slower rate and is indicative of the apparent dairy saturation and the flattening of employment in that industry, and in milk processing. Twin Falls has experienced solid growth and this is confirmed by modest in-migration and re-

cord-setting new housing starts. The opening of Dell Computer Company's technical support call center and the subsequent creation of over 700 jobs contributed strongly to this trend. That moderate trend is expected to continue as Twin Falls County enjoys one of the strongest economies in the state, and the employment outlook continues to be optimistic.

Magic Valley Table 2: South Central Idaho Population Table

COUNTY	2000	2002	PERCENT CHANGE	NUMBER CHANGE
Blaine	18,991	20,378	7.3	1,387
Camas	991	1,037	4.6	46
Cassia	21,416	21,720	1.4	304
Gooding	14,155	14,307	1.1	152
Jerome	18,342	18,703	2.0	361
Lincoln	4,044	4,207	4.0	163
Minidoka	20,174	19,465	-3.5	-709
Twin Falls	64,294	65,472	1.8	1,178
TOTALS	162,407	165,289	1.77	2,882

The area of highest concern is the Mini-Cassia Area. Minidoka County's population decreased by 3.5 percent, or 709 persons from 2000 to 2002. Cassia County showed a moderate increase of 1.4 percent, or 304 persons. However, the net loss to the area was 405 persons. This is somewhat expected due to the announced closure of the J.R. Simplot Company facility and other major layoffs, but what is most alarming are that these figures reflect the situation as of July 1, 2002, only two months after the announcement and before any layoffs occurred. Loss of population at that rate could have a serious effect on such things as school funding and the property tax base. Major loss of population can dramatically affect retail and service businesses since there are fewer consumers to buy goods and services. Real estate values can be adversely impacted as demand drops and supply increases for housing, which then can affect realtors, title companies, etc. It is important to understand these problems and gear economic development at not only attracting and retaining new and existing businesses, but also at attracting and retaining new and existing residents. Overall, South Central Idaho has had fair to moderate growth despite serious economic problems statewide.

Gregory Rogers, Regional Labor Economist
771 N. College Road, Twin Falls, ID 83303
(208) 735-2500, ext. 3639
E-mail: grogers@jobservice.us



SOUTHEAST IDAHO

BANNOCK, BEAR LAKE, BINGHAM, CARIBOU, FRANKLIN, ONEIDA, & POWER COUNTIES

EMPLOYMENT TRENDS

In March 2003 the Pocatello Metropolitan Statistical Area's (MSA) seasonally adjusted unemployment rate was 5.1 percent, as shown in Southeast Idaho Table 1. This was one-tenth of a percentage point less than February 2003 and 1.5 percent less than March 2002. The area's unemployment rate was four-tenths of a percentage point below Idaho's unemployment rate of 5.5 percent and seven-tenths of a percentage point below the U.S. unemployment rate of 5.8 percent.

Mild weather in March 2003 allowed agricultural and construction activities to begin earlier than in March 2002, boosting employment this year.

Nonfarm Payroll Jobs decreased slightly (0.2 percent) in March 2003 from February 2003. Job losses occurred in both the *Goods-Producing* and *Service-Producing* sectors. In the *Goods-Producing Industries*, which include *Natural Resources & Mining*, *Construction*, and *Manufacturing*, job losses in *Manufacturing* (-20) slightly outpaced job gains in *Construction* (10) for an overall decrease of 10 jobs. The *Service-Producing Industries*, which include *Trade, Transportation & Utilities*, *Information*, *Financial Activities*, *Professional & Business Service*, *Educational & Health Services*, *Leisure & Hospitality*, *Government Education*, and *Government Administration*, lost 60 jobs in March 2003 from February 2003. Job gains and losses followed typical patterns for this time of year when weather has a significant impact on the labor market. *Wholesale Trade* (20) and *Retail Trade* (30) gained jobs in March as preparation for the spring and summer retail season began. At the same time, the railroad laid off nearly 20 workers in the *Trade, Transportation & Utilities* industry, offsetting some of the overall gains. Pocatello hosted the Dodge National Circuit Finals Rodeo in March, which added jobs in *Leisure & Hospitality* (20), but those job gains were offset by job losses in *Finance*

Southeast Idaho Table 1: Labor Force & Employment
Pocatello City MSA (Bannock County)

	March 2003*	April 2003	March 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	40,710	40,250	39,070	1.1	4.2
Unemployment	2,070	2,100	2,580	-1.4	-19.8
% of Labor Force Unemployed	5.1	5.2	6.6		
Total Employment	38,640	38,150	36,490	1.3	5.9
Unadjusted					
Civilian Labor Force	41,490	41,030	39,670	1.1	4.6
Unemployment	2,300	2,500	2,810	-8.0	-18.1
% of Labor Force Unemployed	5.5	6.1	7.1		
Total Employment	39,190	38,530	36,860	1.7	6.3
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	33,600	33,670	32,900	-0.2	2.1
Goods-Producing Industries	4,320	4,330	4,100	-0.2	5.4
Natural Resources & Mining	10	10	10	0.0	0.0
Construction	1,670	1,660	1,420	0.6	17.6
Manufacturing	2,640	2,660	2,670	-0.8	-1.1
Food Manufacturing	430	430	480	0.0	-10.4
Fabricated Metal Product Manufacturing	130	140	120	-7.1	8.3
Machinery Manufacturing	40	40	30	0.0	33.3
Other Manufacturing	2,040	2,050	2,040	-0.5	0.0
Service-Producing Industries	29,280	29,340	28,810	-0.2	1.6
Trade, Transportation & Utilities	6,740	6,710	6,610	0.4	2.0
Wholesale Trade	1,080	1,060	1,010	1.9	6.9
Retail Trade	4,410	4,380	4,320	0.7	2.1
Utilities	50	50	50	0.0	0.0
Transportation & Warehousing	1,200	1,220	1,210	-1.6	-0.8
Information	680	680	660	0.0	3.0
Financial Activities	1,700	1,720	1,780	-1.2	-4.5
Professional & Business Services	3,270	3,310	3,330	-1.2	-1.8
Educational & Health Services	2,720	2,700	3,030	0.7	-10.2
Leisure & Hospitality	3,230	3,210	3,090	0.6	4.5
Other Services	1,310	1,310	1,190	0.0	10.1
Government Education	5,490	5,550	5,620	-1.1	-2.3
Government Administration	4,140	4,150	3,490	-0.2	18.6

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

Activities (-20), *Professional & Business Service* (-40), *Government Education* (-60), and *Government Administration* (-10). The major change was in *Government Education* because the number of students employed in work-study programs at Idaho State University declined.

From one-year-ago, *Nonfarm Payroll Jobs* increased 2.1 percent. The change may be partially because of milder weather in March 2003 than in March 2002. Inclement weather in March 2002 delayed many spring activities that occurred in March 2003, such as construction and recreation. In March 2003 the *Goods-Producing Industries* outpaced March 2002 by 220 jobs. The job gains were exclusively in *Construction* because of residential projects and construction of the Idaho State University Performing Arts Center. In March 2003 the *Service-Producing Industries* outpaced March 2002

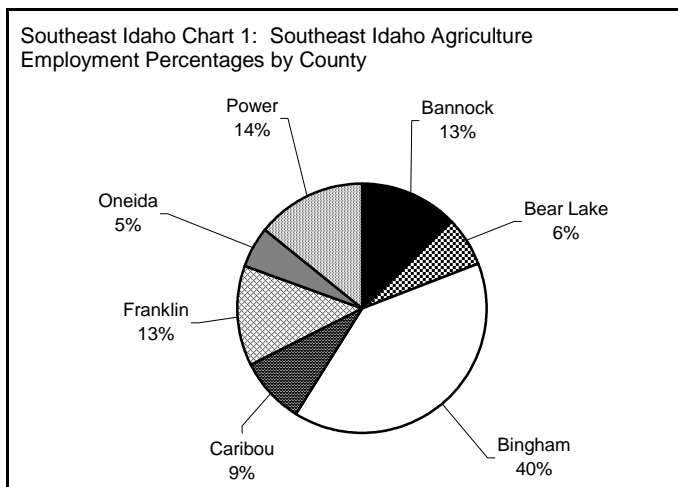
by 470 jobs. Most job gains were in *Wholesale and Retail Trade* (160), *Leisure & Hospitality* (140) and *Other Services* (120). Gains were partially offset by losses in *Transportation* because of layoffs at the Union Pacific Railroad and decreases in *Government Education*. Southeast Idaho Table 1 shows dramatic changes from March 2002 to March 2003 in *Education & Health Services*, down 310 jobs, and in *Government Administration*, which had an increase of 650 jobs. These changes are mostly because of the merger of a private hospital with a county-owned hospital where nearly 400 jobs moved from *Education & Health* to *Government Administration*. The remaining increase in *Government Administration* was because of added jobs in *Federal Government* for airport security and spring/summer related maintenance projects.

SPECIAL TOPIC: Agricultural Employment

In March, signs of spring could be seen all over Southeast Idaho in the form of agricultural activities. Newborn calves, lambs, and colts could be seen in pastures throughout Southeast Idaho as well as field preparation for the 2003 crop-growing season.

Agriculture is a large industry in Idaho. The Idaho Department of Labor estimates agricultural employment to be approximately 5.5 percent of total annual average employment. It is particularly important to Southeast Idaho where it provides approximately 5.8 percent of the area's annual average employment. Agriculture employment includes operators, paid or unpaid family members, and hired workers.

Southeast Idaho Chart 1 shows that the largest percentage of agriculture employment in Southeast Idaho is in Bingham County at 40 percent. Many of the crops grown in Bingham County are labor-intensive, such as potatoes, sugar beets, and alfalfa. This requires hiring seasonal domestic workers as well as migrant workers who either migrate to the area to work during the crop-growing season or follow the crops from area to area, assisting with harvest.



Agriculture employment and its relative importance to an area vary from county to county within the Southeast Idaho region. Southeast Idaho Table 2 shows the

relative importance of agriculture to each county in the region. Power County has the highest proportion of agriculture employment when compared with total employment of any county in Southeast at 21.0 percent. Bannock County has the lowest at just 1.5 percent.

Southeast Idaho Table 2: Agricultural Employment			
2002	Agriculture Employment	Total Employment	% of Total Employment
Bannock	553	36,882	1.5
Bear Lake	274	2,677	10.2
Bingham	1,705	21,422	8.0
Caribou	371	3,025	12.3
Franklin	550	4,877	11.3
Oneida	234	1,624	14.4
Power	606	2,890	21.0
Southeast Idaho	4,293	73,397	5.8

This year, agriculture faces familiar uncertainties: drought, increased costs of inputs, weather uncertainties, and fluctuating market prices. But area farmers and ranchers have proven, time and time again, their resilience and ability to make the best under adverse conditions.

AREA ECONOMIC DEVELOPMENTS

Please note: Information contained in Area Economic Developments is obtained from area newspapers, local Job Service offices, trade publications, local area Chambers of Commerce publications, and other sources.

Bannock County

- Global Food Technologies, Inc. in Pocatello announced it expects to hire approximately 200 people by the end of the year. The company recently received approval of patents for systems that reduce bacteria in seafood; it plans to produce similar systems for poultry and meat. Testing and manufacturing of these systems will be done in the Pocatello facility. The company plans to hire the first 30 people by mid-summer 2003.
- IHOP (International House of Pancakes) opened at 4122 Yellowstone Avenue in Chubbuck. The business, which opened in February, employs approximately 60 people.
- Funky-Junque, an antique store, opened at 1225 East Clark in Pocatello. Laura and Arden Olson own the store.
- A soccer specialty shop, Soccer Rockers, opened at 171 Jefferson in Pocatello. The family-owned and operated business specializes in clothing and equipment for soccer players and teams.
- Winward Physical Therapy has opened a clinic in McCammon. The clinic is open Tuesdays and Thursdays and offers rehabilitative, sports injury, and pain therapy.

Continued on page 30



NORTHEAST IDAHO

BONNEVILLE, BUTTE, CLARK, CUSTER, FREMONT, JEFFERSON, LEMHI, MADISON, & TETON COUNTIES

EMPLOYMENT TRENDS

March's seasonally adjusted unemployment rate for the Bonneville Labor Market Area (LMA) decreased one-tenth of a percentage point over the month to 3.6 percent in March as seen in Northeast Table 1. Year-over-year, the LMA's unemployment rate decreased five-tenths of a percentage point. The *Civilian Labor Force* grew by more than 40 people from March 2002, while the number of unemployed decreased by approximately 380. Three variables can be cited as contributors to the decreases: a mild winter that has allowed an earlier start into major construction projects, more confident consumers in light of war and past tragedies, and a heavy concentration on economic development.

Of the four counties in the LMA, Butte saw the greatest decrease in unemployment over the month (down 1.3 percentage points) for a March 2003 rate of 4.0 percent. Year-over-year, however, Butte County was the only county in the LMA to show a gain. Butte County has been affected by changes at the Idaho National Engineering & Environmental Laboratory (INEEL) and a slowdown in construction in the Sun Valley area. Bingham (4.3 percent), Bonneville (3.3 percent), and Jefferson (3.9 percent) Counties showed relatively stable rates over the month, and all showed decreases in a year-over-year comparison. Idaho Falls, the largest city in the LMA, showed no change over the month, but decreased three-tenths of a percentage point from March 2002 to end with a rate of 3.5 percent. (See labor force data for all Idaho counties and LMAs on State Table 1 on page 3.)

Other counties in Northeast Idaho saw very little change in unemployment over the month, with the exception of Clark County, which decreased 1.0 percentage point. Clark County saw the largest decrease year-over year, from 9.9 percent to 7.4 percent. The county is heavily dependent on agricultural activi-

Northeast Idaho Table 1: Labor Force & Employment
Bonneville, Bingham, Butte, and Jefferson Counties

	March 2003*	Feb 2003	March 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	83,760	83,390	83,720	0.4	0.0
Unemployment	3,040	3,090	3,420	-1.6	-11.1
% of Labor Force Unemployed	3.6	3.7	4.1		
Total Employment	80,710	80,300	80,290	0.5	0.5
Unadjusted					
Civilian Labor Force	81,730	81,240	82,630	0.6	-1.1
Unemployment	3,370	3,830	3,650	-12.0	-7.7
% of Labor Force Unemployed	4.1	4.7	4.4		
Total Employment	78,370	77,400	78,980	1.3	-0.8
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	61,800	60,992	60,792	1.3	1.7
Goods-Producing Industries	9,374	9,028	8,818	3.8	6.3
Natural Resources & Mining	60	51	65	17.6	-7.7
Construction	4,051	3,749	3,642	8.1	11.2
Manufacturing	5,263	5,228	5,111	0.7	3.0
Food Manufacturing	2,690	2,691	2,874	0.0	-6.4
Fabricated Metal Product Manufacturing	286	291	234	-1.7	22.2
Machinery Manufacturing	471	471	412	0.0	14.3
Other Manufacturing	1,816	1,775	1,591	2.3	14.1
Service-Producing Industries	52,426	51,964	51,974	0.9	0.9
Trade, Transportation & Utilities	14,031	13,854	14,266	1.3	-1.6
Wholesale Trade	4,820	4,750	5,111	1.5	-5.7
Retail Trade	7,363	7,280	7,514	1.1	-2.0
Utilities	105	104	99	1.0	6.1
Transportation	1,743	1,720	1,542	1.3	13.0
Information	802	826	907	-2.9	-11.6
Financial Activities	1,977	1,972	2,058	0.3	-4.0
Professional & Business Services	11,444	11,349	11,273	0.8	1.5
Educational & Health Services	6,285	6,213	5,817	1.2	8.0
Leisure & Hospitality	4,599	4,531	4,577	1.5	0.5
Other Services	2,232	2,245	2,232	-0.6	0.0
Government Education	5,184	5,140	5,189	0.9	-0.1
Government Administration	5,872	5,834	5,654	0.7	3.9

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

ties and preparation for planting crops started early this year due to a mild winter.

Nonfarm Payroll Jobs in the LMA increased by over 800 from the previous month for a total of 61,800 jobs. *Construction* contributed to almost half of the job increase due to a mild winter that allowed earlier starts on larger projects in both the residential and commercial sectors. *Retail Trade*, *Wholesale Trade*, and *Professional & Business Services* also showed increases of close to 100 jobs each. This shows that consumers are overcoming hesitations brought about by earlier tragedies and uncertainties of war, and they are gaining some confidence in spending and investment ventures once again.

Year-over-year, the LMA showed a job increase of over 1,000 with greater contributions from *Construction*, *Educational & Health Services*, and

Government Administration. Construction showed the largest increase of over 400 jobs as the area continues to see growth in both residential and commercial areas. Larger projects have helped boost these numbers, such as the construction of a Grupo Modelo malt plant, Taylor Crossing on the River (a professional business park), and Anheuser Busch expansions, all in the Idaho Falls area, along with the completion of the BNFL plant at the INEEL in Butte County. *Health Services* continues to see growth as specialized doctors and new medical techniques continue to filter into the area due to the wide geographical area that use services in Bonneville County. Losses year-over-year were noted in *Wholesale Trade, Retail Trade, and Information* as effects of the national economy continue to slowly trickle into the area. *Food Manufacturing* also noted a loss of almost 200 jobs, but was counteracted by *Metal, Machinery, and Other Manufacturing* gains to show an overall gain in *Manufacturing* of over 150 jobs.

AREA DEVELOPMENTS

INEEL

- The INEEL will soon be known as the Idaho National Laboratory (INL) once it integrates with Argonne and new contracts are awarded. The change is expected to take place in September 2004. Bechtel BWXT, currently the main contractor for the site, and Argonne are expected to enter bids for the new contracts which will focus on the site's new mission—nuclear energy and other research—and cleanup, its ongoing mission. Bill Magwood, U.S. Department of Energy Director of Nuclear Energy, Science and Technology, will oversee the new laboratory. Although nuclear energy research will be the primary focus of the new contract, it will continue to be a multi-program site.

Bonneville County

- Local Idaho Falls businessman LaMoyne Hyde was appointed the state's new Director for the Department of Commerce by Governor Dirk Kempthorne. He replaces Gary Mahn who retired as director last year. Hyde is a drift boat manufacturer and outfitter who is known worldwide through the businesses he owns in the eastern Idaho area. Hyde is also a member of the governor's Travel Council and has served on the Governor's Economic Advisory Board. He is also a board member of the Idaho Falls Chamber of Commerce and Eastern Idaho Economic Development Council.
- The Greater Idaho Falls Chamber of Commerce is losing its President. Mike Kuhns, who has been President and CEO for the past two years, has taken a job in Virginia and left at the end of May. Kuhns has seen many accomplishments during his time in office including the new convention and visitor's

bureau that fronts Broadway Avenue just beyond the downtown falls.

- King B, an Idaho Falls meat-packing company that employs close to 275 employees, entered into an agreement with the world's largest manufacturer of meat snacks. Jack Link's now has exclusive rights to King B's information, property, and trade names. Consumers should not notice a change as the name brand and operation will remain the same. Since King B is sister company to Taylor Country Farms in Oregon, they will also be included in the deal. King B will now be known as Ball Manufacturing, Inc.

Madison

- Brigham Young University – Idaho (BYU-Idaho) recently broke ground on its newest building that will be known as the Thomas E. Ricks Building. In 1888, Thomas Ricks was appointed chairman of the Board of Education of the Bannock Stake Academy, the predecessor of Ricks College. In 1902, a year after his death, the academy was renamed Ricks Academy in his honor and later became known as Ricks College, which is now BYU - Idaho. The new building will be built by Jackobsen Construction of Salt Lake City and will house math, history, geography, political science, psychology, sociology, and social work departments. It will be a two-story, L-shaped building that will wrap around the Landscape Horticulture Gardens. It will have 23 classrooms, 58 offices, four reception areas, and an animal science laboratory. Work will begin in May and expected completion is spring 2005.
- The IntelliStar Group is now headquartered in Rexburg. The group is a consortium of companies that specialize in providing technical support and equipment for operations of homeland security. The consortium consists of Collaborative Genetics, specializing in infectious diseases, plant and animal diseases and biowarfare agents; Qual-Tek Associates, specializing in radiation detection, health physics, and transportation and disposal of radioactive materials; and TeraPascal, specializing in explosives, chemicals, and hazardous materials handling. The consortium plans to serve such customers as educational and government entities along with commercial customers. Collaborative Genetics is the only business located in the county.

Tanya Albán, Regional Labor Economist
 150 Shoup Avenue, Idaho Falls, ID 83402
 (208) 557-2500, ext. 3587
 E-mail: talban@jobservice.us

IDAHO INCOME AND WAGE DATA FOR 2001, 2002 RELEASED

Information on income and wages are two of the most frequently requested labor market data items. Recently, two data items became available—per capita income for 2001 and average covered wages for 2002 by county. Beginning with 2001, the U.S. Bureau of Economic Analysis began using earnings by industry based on the North American Industry Classification System (NAICS) in the calculation of Total Personal Income (TPI) and Per Capita Personal Income (PCPI). The estimates of earnings by industry for 1969-2000 were based on the Standard Industrial Classification System (SIC). With the release of the 2001 data, per capita and TPI data for 1999 and 2000 by county have been revised. The covered wage data also uses the NAICS-based data.

State Income

The U.S. Department of Census released the state PCPI data for 2002 in late April. The nation's PCPI was \$30,941 in 2002, up 2.8 percent from \$30,413 in 2001. Idaho's PCPI increased 2.2 percent, from \$24,506 in 2001 to \$25,057 in 2002. Idaho ranked 30th in percent increase and 44th in PCPI in 2002. Idaho's PCPI is 81 percent of the national level.

The states with the fastest growing PCPI in 2002 were North Dakota, Montana, and Louisiana, each of which grew by more than 4.0 percent. These states tend to be relatively small, have below-average population growth rates, and have above-average shares of farms and mining earnings.

Connecticut, New York, Texas, and Nevada were states that experienced less than 1.0 percent growth. California, one of the most populous states, experienced only a 1.0 percent growth in PCPI in 2002. Georgia and Massachusetts also experienced only 1.0 percent growth. These seven states had the slowest growth in PCPI. Colorado was the only state that experienced a decrease, 0.5 percent, in PCPI.

The 10 states with the highest PCPI are: Connecticut - \$42,706, New Jersey - \$39,453, Massachusetts - \$39,244, Maryland - \$36,298, New York - \$36,043, New Hampshire - \$34,334, Minnesota - \$34,071, Illinois - \$33,276, Colorado - \$33,276, and California - \$32,996. The 10 states with the lowest PCPI are: Louisiana - \$25,446, South Carolina - \$25,400, Alabama - \$25,128, Idaho - \$25,057, Montana - \$25,020, Utah - \$24,306, New Mexico - \$23,941, West Virginia - \$23,688, Arkansas - \$23,512, and Mississippi - \$22,372.

The PCPI for Alaska, Hawaii and the states surrounding Idaho can be found in Tables 1 through 4 on pages 22-23. Of the selected states, Idaho was \$5,884 below the national average of PCPI, with only Montana and Utah lower. Population growth in Idaho has slowed from a high of 3.5 percent between 1992 and 1993 to 1.6 percent between 2001 and 2002. Of the selected states, California, Nevada, and Washington experienced a decline in population between 2001 and 2002.

County Income

FYI Table 5 on page 24 provides TPI and PCPI for the United State, Idaho, the metropolitan portions of Idaho, the non-metropolitan portions of Idaho, and the 44 counties for 1999, 2000, and 2001. The following list includes highlights of the 2001 data that was released by the U.S. Department Commerce.

- Ada County had the highest TPI at \$10,555 million.
- Blaine County had the highest PCPI at \$43,919 and has since 1994.
- Gooding County had the largest percent increase in both TPI and PCPI, 15.2 percent and 14.7 percent, respectively.
- Camas County had the lowest TPI at \$21 million.
- Madison County had the lowest PCPI at \$14,319, continuing its 44th ranking since 1969. Madison County, with a population of 27,686, is the home to Brigham Young University - Idaho that has over 10,000 students enrolled resulting in a low PCPI.
- Butte County had the largest percent decrease in TPI and PCPI, 8.9 percent and 7.3 percent, respectively. Butte County's PCPI dropped to \$20,630 in 2001. This is a result in the drop in number of personnel at the INEEL.
- Ada and Blaine Counties were the only counties that had a PCPI that exceeded the national level of \$30,413. Four additional counties—Bonneville, Gooding, Nez Perce, and Valley—had a PCPI that exceeded the state level of \$24,506.
- Idaho has two Metropolitan Statistical Areas (MSAs)—Boise City MSA and Pocatello City MSA. The Boise City MSA's PCPI of \$29,109 is a decrease of \$185 from 2000. The decrease was a result of the layoffs in the electronics industry in the area, which began in March 2001.

- Pocatello City MSA's PCPI increased \$699 to \$21,780 in 2001. However, the PCPI is below the state level.

Average Covered Wages

FYI Table 6 on page 25 provides average covered wages by major industry for the state for 2001 and 2002. The data is derived from the quarterly reports of covered employment and wages filed by employers covered by Idaho's Unemployment Insurance Law. The following list includes highlights of the 2002 data.

- Average wages for all industries in 2002 was \$28,157, up 1.6 percent from 2001.
- *Leisure & Hospitality*, a new NAICS designation, had the lowest average wage, \$11,453, up 8.4 percent from 2001. This group includes not only lodging facilities but also eating and drinking establishments. Both of these sectors tend to be lower paying and employ part-time workers.
- *Leisure & Hospitality*, although the lowest paid sector, had the largest percent increase in wages, 8.4

percent. The two major groups in this sector are *Food Services & Drinking Places* and *Accommodations*. The wages in these two groups vary significantly. *Food Services & Drinking Places* have over 38,000 employees compared to 7,700 in *Accommodations*. *Food Services & Drinking Places* had an average wage of \$9,560 compared to \$14,005 in *Accommodations*, resulting in lower wage in this major sector.

- All major industrial sectors in 2002 experienced an increase in the average wage from 2001.
- *Construction* wages had the smallest increase, \$7.00 per hour or 0.0 percent.

(See "Ask the Economist" on page 28 for more information about TPI and PCPI.)

Janell Hyer, Regional Labor Economist Supervisor
E-mail: jhyer@jobservice.us
317 W. Main Street, Boise, ID 83735
(208) 332-3570, ext. 3220

FYI Table 1: Per Capita Personal Income by Selected States, 2002

	Dollars	% of National Average	Dollar Difference from Average	Rank in U.S.	% Change 2001-02
United States	\$30,941	100			
Alaska	32,151	104	\$1,210	14	3.6
California	32,996	107	\$2,055	10	1.0
Hawaii	30,001	97	(\$940)	20	3.3
Idaho	25,057	81	(\$5,884)	44	2.2
Montana	25,020	81	(\$5,921)	45	4.1
Nevada	30,180	98	(\$761)	19	0.2
Oregon	28,731	93	(\$2,210)	29	1.8
Utah	24,306	79	(\$6,635)	46	1.1
Washington	32,677	106	\$1,736	13	2.2
Wyoming	30,578	99	(\$363)	17	3.3

SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis, April 23, 2003

FYI Table 2: Per Capita Personal Income by Selected States, 2000 - 2002

	Dollars				Percent Change		
	1999	2000	2001	2002	1999-00	2000-01	2001-02
United States	\$27,880	\$29,760	\$30,413	\$30,941	6.7	2.2	1.7
Alaska	28,170	29,960	31,027	32,151	6.4	3.6	3.6
California	29,712	32,363	32,655	32,996	8.9	0.9	1.0
Hawaii	26,957	28,354	29,034	30,001	5.2	2.4	3.3
Idaho	22,656	23,987	24,506	25,057	5.9	2.2	2.2
Montana	21,621	22,961	24,044	25,020	6.2	4.7	4.1
Nevada	28,655	29,794	30,128	30,180	4.0	1.1	0.2
Oregon	26,247	27,836	28,222	28,731	6.1	1.4	1.8
Utah	22,203	23,410	24,033	24,306	5.4	2.7	1.1
Washington	29,807	31,605	31,976	32,677	6.0	1.2	2.2
Wyoming	26,294	27,941	29,587	30,578	6.3	5.9	3.3

SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis, April 23, 2003

FYI Table 3: Total Personal Income by Selected States, 2000 - 2002

	Millions of Dollars				Percent Change		
	1999	2000	2001	2002	1999-00	2000-01	2001-02
United States	\$777,952	\$8,398,871	\$8,677,490	\$8,922,320	979.6	3.3	2.8
Alaska	17,600	18,806	19,660	20,699	6.9	4.5	5.3
California	995,326	1,100,679	1,129,868	1,158,679	10.6	2.7	2.5
Hawaii	32,626	34,384	35,625	37,348	5.4	3.6	4.8
Idaho	28,901	31,177	32,363	33,605	7.9	3.8	3.8
Montana	19,405	20,744	21,769	22,755	6.9	4.9	4.5
Nevada	55,439	60,149	63,200	65,596	8.5	5.1	3.8
Oregon	89,080	95,508	98,026	101,176	7.2	2.6	3.2
Utah	48,923	52,518	54,764	56,299	7.3	4.3	2.8
Washington	174,148	186,843	191,645	198,317	7.3	2.6	3.5
Wyoming	12,931	13,805	14,609	15,249	6.8	5.8	4.4

SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis, April 23, 2003

FYI Table 4: Population by Selected States, 2000 -2002

	Thousands of Persons				Percent Change		
	1999	2000	2001	2002	1999-00	2000-01	2001-02
United States	279,040,168	282,224,348	285,317,559	288,368,698	1.1	1.1	1.1
Alaska	624,779	627,697	633,630	643,786	0.5	0.9	1.6
California	33,499,204	34,010,375	34,600,463	35,116,033	1.5	1.7	1.5
Hawaii	1,210,300	1,212,670	1,227,024	1,244,898	0.2	1.2	1.5
Idaho	1,275,674	1,299,721	1,320,585	1,341,131	1.9	1.6	1.6
Montana	897,507	903,416	905,382	909,453	0.7	0.2	0.4
Nevada	1,934,718	2,018,828	2,097,722	2,173,491	4.3	3.9	3.6
Oregon	3,393,941	3,431,137	3,473,441	3,521,515	1.1	1.2	1.4
Utah	2,203,482	2,243,406	2,278,712	2,316,256	1.8	1.6	1.6
Washington	5,842,564	5,911,803	5,993,390	6,068,996	1.2	1.4	1.3
Wyoming	491,780	494,086	493,754	498,703	0.5	-0.1	1.0

SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis, April 23, 2003

FYI Table 5: Idaho Total Personal Income and Per Capita Personal Income

Area Name	Total Personal Income (Millions of Dollars)			TPI Change 2000-2001	Per Capita Personal Income			PCPI Change 2000-2001	State PCPI rank 2001
	1999	2000	2001		1999	2000	2001		
United States 12	7,779,521	8,398,871	8,677,490	3.3%	\$27,880	\$29,760	\$30,413	2.2%	-
State of Idaho	28,901	31,177	32,363	3.8%	\$22,656	\$23,987	\$24,506	2.2%	.
Metropolitan portion	12,942	14,369	14,804	3.0%	\$26,065	\$28,081	\$28,056	-0.1%	-
Boise City MSA	11,424	12,776	13,153	3.0%	\$27,135	\$29,294	\$29,109	-0.6%	
Pocatello City MSA	1,518	1,593	1,651	3.6%	\$20,098	\$21,081	\$21,780	3.3%	
Nonmetropolitan portion	15,959	16,808	17,559	4.5%	\$20,483	\$21,329	\$22,144	3.8%	-
Ada	9,116	10,292	10,555	2.6%	\$30,975	\$33,964	\$33,739	-0.7%	2
Adams	70	75	76	1.6%	\$19,849	\$21,635	\$22,304	3.1%	12
Bannock	1,518	1,593	1,651	3.6%	\$20,098	\$21,081	\$21,780	3.3%	14
Bear Lake	104	107	115	7.8%	\$16,334	\$16,631	\$17,842	7.3%	35
Benewah	173	180	190	5.3%	\$19,034	\$19,595	\$21,029	7.3%	20
Bingham	738	784	817	4.2%	\$17,772	\$18,748	\$19,340	3.2%	30
Blaine	731	809	869	7.4%	\$39,462	\$42,275	\$43,919	3.9%	1
Boise	112	129	135	4.5%	\$17,680	\$19,184	\$19,502	1.7%	29
Bonner	685	725	762	5.1%	\$18,877	\$19,583	\$20,432	4.3%	23
Bonneville	1,844	1,962	2,080	6.0%	\$22,602	\$23,670	\$24,806	4.8%	6
Boundary	170	178	174	-1.9%	\$17,523	\$17,902	\$17,523	-2.1%	37
Butte	60	65	59	-8.9%	\$20,833	\$22,250	\$20,630	-7.3%	22
Camas	19	19	21	8.5%	\$18,667	\$19,378	\$20,394	5.2%	24
Canyon	2,308	2,484	2,598	4.6%	\$18,217	\$18,661	\$18,690	0.2%	34
Caribou	147	151	157	4.2%	\$20,221	\$20,677	\$21,277	2.9%	17
Cassia	460	453	478	5.5%	\$21,481	\$21,144	\$22,121	4.6%	13
Clark	20	21	21	-0.1%	\$20,467	\$20,265	\$21,046	3.9%	19
Clearwater	173	179	182	1.8%	\$19,136	\$20,129	\$21,163	5.1%	18
Custer	92	98	101	2.5%	\$21,208	\$22,634	\$23,581	4.2%	9
Elmore	565	587	613	4.5%	\$19,557	\$20,163	\$20,919	3.7%	21
Franklin	177	180	194	7.4%	\$15,777	\$15,870	\$16,893	6.4%	39
Fremont (incl. Yellowstone)	187	198	198	0.1%	\$15,777	\$16,795	\$16,759	-0.2%	41
Gem	273	297	297	0.1%	\$18,156	\$19,504	\$19,263	-1.2%	32
Gooding	357	329	380	15.2%	\$25,550	\$23,204	\$26,623	14.7%	4
Idaho	272	290	297	2.6%	\$17,529	\$18,718	\$19,305	3.1%	31
Jefferson	348	369	386	4.8%	\$18,317	\$19,176	\$19,975	4.2%	26
Jerome	429	408	446	9.3%	\$23,756	\$22,142	\$24,152	9.1%	7
Kootenai	2,336	2,567	2,678	4.3%	\$21,965	\$23,436	\$23,983	2.3%	8
Latah	700	740	763	3.2%	\$20,058	\$21,200	\$21,716	2.4%	15
Lemhi	150	153	162	6.0%	\$18,876	\$19,714	\$21,283	8.0%	16
Lewis	75	81	81	0.4%	\$20,052	\$21,628	\$22,438	3.7%	11
Lincoln	78	80	84	5.2%	\$19,506	\$19,576	\$20,111	2.7%	25
Madison	368	384	392	2.2%	\$13,497	\$13,991	\$14,319	2.3%	44
Minidoka	346	347	349	0.6%	\$17,025	\$17,243	\$17,823	3.4%	36
Nez Perce	896	944	963	2.0%	\$23,914	\$25,255	\$26,014	3.0%	5
Oneida	62	63	66	3.5%	\$15,155	\$15,340	\$15,687	2.3%	43
Owyhee	176	176	188	6.8%	\$16,901	\$16,471	\$17,251	4.7%	38
Payette	374	395	415	5.0%	\$18,373	\$19,147	\$19,956	4.2%	27
Power	153	157	149	-4.9%	\$20,011	\$20,863	\$19,905	-4.6%	28
Shoshone	259	267	258	-3.3%	\$18,753	\$19,438	\$19,188	-1.3%	33
Teton	87	95	103	8.3%	\$15,163	\$15,577	\$15,919	2.2%	42
Twin Falls	1,331	1,393	1,475	5.9%	\$20,851	\$21,644	\$22,812	5.4%	10
Valley	194	210	217	3.1%	\$25,407	\$27,486	\$28,315	3.0%	3
Washington	165	164	168	2.5%	\$16,448	\$16,400	\$16,847	2.7%	40

SOURCE: U.S. Department of Commerce, Economics and Statistics Administration, Bureau of Economic Analysis, May 6, 2003

FYI Table 6: Average Covered Wages by Major Industry for Idaho--2001 and 2002

	2002	2001	Percent Change From 2002
Average Covered Wages (NAICS)	28,157	27,711	1.6
Ag	20,968	20,743	1.1
Mining	40,056	38,858	3.1
Construction	31,050	31,057	0.0
Manufacturing	38,230	37,676	1.5
Wood Product Manufacturing	29,038	28,202	3.0
Computer & Electronic Product Man	31,301	31,540	-0.8
Food Manufacturing	57,597	55,019	4.7
Other Manufacturing	32,116	31,942	0.5
Trade	24,141	24,286	-0.6
Wholesale Trade	34,535	34,441	0.3
Retail Trade	20,558	20,764	-1.0
Utilities	68,343	60,366	13.2
Transportation & Warehousing	27,517	27,049	1.7
Information	33,303	32,985	1.0
Financial Activities	33,109	32,416	2.1
Professional and Business Services	33,052	32,548	1.5
Educational and Health Services	28,310	27,522	2.9
Leisure and Hospitality	11,453	10,561	8.4
Other Services	20,189	19,781	2.1
Government	29,937	29,062	3.0

COUNTY POPULATION NUMBERS RELEASED

The Population Division of the U.S. Bureau of the Census released county population data for 2002. The latest information has been combined with the data released since the 2000 census in Table 7 on page 27.

2002 Population Highlights

- Teton County had the largest percent increase with 5.9 percent, or 380 new residents.
- Ada County had the largest numeric increase with 6,848 new residents for a 2.2 percent increase.
- Four counties added over 1,000 new residents: Ada, Bonneville, Canyon, and Kootenai Counties. Twelve counties added fewer than 100 residents: Adams, Butte, Camas, Clark, Fremont, Gem, Gooding, Latah, Lemhi, Lewis, Lincoln, and Nez Perce Counties.
- Fourteen counties lost population between 2001 and 2002: Bannock, Bear Lake, Benewah, Caribou, Clearwater, Custer, Idaho, Minidoka, Oneida, Owyhee, Power, Shoshone, Valley, and Washington Counties.
- Shoshone County had the largest percent decrease (-2.8 percent), as well as the largest numeric loss of population of 374 residents.
- Ada County has had the largest county population since 1969.
- Since 1992, Ada, Canyon, Kootenai, Bonneville, Bannock, and Twin Falls Counties have been ranked one through six, respectively, in population.
- Clark County, for the second year, had the smallest population at 997.
- Clark and Camas County have vied for the smallest populated county. For the first time in 1999, Camas County reported more than 1,000 residents. Clark County soon followed the next year.

The population growth is broken down by births, death, international migration, and domestic migration. An international migrant is someone

coming from a county outside of the United States, whereas a domestic migrant is described as a person who moved to Idaho from another state. Contributing to the state's 2002 population growth were 20,298 births, 3,462 international migrates, and 6,640 domestic migrates. During the last year 10,051 deaths were recorded in the state.

Demographic highlights of the 2001 to 2002 changes include:

- Ada County had the highest number of births—4,825; deaths—2,012; and international migrants—976.
- Canyon County had the highest number of domestic migrants—3,924.
- Canyon County had the second highest number of births—2,490; deaths—1,029; and international migrants—523.
- Camas County had the fewest births—11—and no deaths.
- Bannock County had the largest decrease in domestic migrants—883.
- Twenty-two other counties experienced a loss in domestic migrants contributing to an overall population loss in fourteen counties.

For more information, contact a local area Regional Labor Economist or access the data from the U.S. Bureau of Census on the Internet at <http://www.census.gov/population/www/estimates/popest.html>.

Janell Hyer, Regional Labor Economist Supervisor
 E-mail: jhyer@jobservice.us
 317 W. Main Street, Boise, ID 83735
 (208) 332-3570, ext. 3220

F.Y.I. Tables (cont.)

FOR YOUR INFORMATION

FYI Table 7: Idaho County Population Estimates - July 1, 2002									
	Census 2000 Popu- lation	7/1/2000 Popu- lation	7/1/2001 Popu- lation	7/1/2002 Popu- lation	Percent Change				
					2002 - 2001	2001 - 2000	2002 - 2000	Census to 2002	Rank 2002
United States	281,421,906	282,224,348	285,317,559	288,368,698	1.1	1.1	2.2	2.5	
Idaho	1,293,953	1,299,721	1,320,585	1,341,131	1.6	1.6	3.2	3.6	
Ada County	300,904	303,031	312,839	319,687	2.2	3.2	5.5	6.2	1
Adams County	3,476	3,467	3,418	3,448	0.9	-1.4	-0.5	-0.8	41
Bannock County	75,565	75,579	75,812	75,804	0.0	0.3	0.3	0.3	5
Bear Lake County	6,411	6,427	6,459	6,360	-1.5	0.5	-1.0	-0.8	36
Benewah County	9,171	9,197	9,023	8,993	-0.3	-1.9	-2.2	-1.9	28
Bingham County	41,735	41,814	42,249	42,458	0.5	1.0	1.5	1.7	7
Blaine County	18,991	19,130	19,780	20,378	3.0	3.4	6.5	7.3	15
Boise County	6,670	6,748	6,936	7,067	1.9	2.8	4.7	6.0	34
Bonner County	36,835	37,027	37,297	38,205	2.4	0.7	3.2	3.7	8
Bonneville County	82,522	82,889	83,858	85,180	1.6	1.2	2.8	3.2	4
Boundary County	9,871	9,924	9,946	10,085	1.4	0.2	1.6	2.2	26
Butte County	2,899	2,900	2,851	2,890	1.4	-1.7	-0.3	-0.3	42
Camas County	991	981	1,011	1,037	2.6	3.1	5.7	4.6	43
Canyon County	131,441	133,088	139,004	144,983	4.3	4.4	8.9	10.3	2
Caribou County	7,304	7,310	7,401	7,319	-1.1	1.2	0.1	0.2	33
Cassia County	21,416	21,411	21,595	21,720	0.6	0.9	1.4	1.4	13
Clark County	1,022	1,031	992	997	0.5	-3.8	-3.3	-2.4	44
Clearwater County	8,930	8,892	8,608	8,446	-1.9	-3.2	-5.0	-5.4	29
Custer County	4,342	4,340	4,269	4,185	-2.0	-1.6	-3.6	-3.6	38
Elmore County	29,130	29,107	29,308	29,481	0.6	0.7	1.3	1.2	11
Franklin County	11,329	11,369	11,472	11,699	2.0	0.9	2.9	3.3	24
Fremont County	11,819	11,797	11,829	11,859	0.3	0.3	0.5	0.3	23
Gem County	15,181	15,219	15,426	15,495	0.4	1.4	1.8	2.1	19
Gooding County	14,155	14,200	14,255	14,307	0.4	0.4	0.8	1.1	21
Idaho County	15,511	15,469	15,395	15,308	-0.6	-0.5	-1.0	-1.3	20
Jefferson County	19,155	19,233	19,347	19,781	2.2	0.6	2.8	3.3	16
Jerome County	18,342	18,443	18,473	18,703	1.2	0.2	1.4	2.0	18
Kootenai County	108,685	109,526	111,659	113,954	2.1	1.9	4.0	4.8	3
Latah County	34,935	34,887	35,154	35,218	0.2	0.8	0.9	0.8	10
Lemhi County	7,806	7,745	7,603	7,649	0.6	-1.8	-1.2	-2.0	30
Lewis County	3,747	3,746	3,626	3,721	2.6	-3.2	-0.7	-0.7	40
Lincoln County	4,044	4,062	4,161	4,207	1.1	2.4	3.6	4.0	37
Madison County	27,467	27,435	27,404	27,686	1.0	-0.1	0.9	0.8	12
Minidoka County	20,174	20,104	19,569	19,465	-0.5	-2.7	-3.2	-3.5	17
Nez Perce County	37,410	37,380	37,019	37,106	0.2	-1.0	-0.7	-0.8	9
Oneida County	4,125	4,128	4,179	4,131	-1.1	1.2	0.1	0.1	39
Owyhee County	10,644	10,697	10,909	10,862	-0.4	2.0	1.5	2.0	25
Payette County	20,578	20,635	20,780	21,007	1.1	0.7	1.8	2.1	14
Power County	7,538	7,514	7,487	7,379	-1.4	-0.4	-1.8	-2.1	32
Shoshone County	13,771	13,745	13,464	13,090	-2.8	-2.0	-4.8	-4.9	22
Teton County	5,999	6,114	6,479	6,859	5.9	6.0	12.2	14.3	35
Twin Falls County	64,284	64,363	64,642	65,472	1.3	0.4	1.7	1.8	6
Valley County	7,651	7,642	7,648	7,526	-1.6	0.1	-1.5	-1.6	31
Washington County	9,977	9,975	9,949	9,924	-0.3	-0.3	-0.5	-0.5	27

SOURCE: Population Estimates Branch, U.S. Census Bureau, April 17, 2003

Ask the Economist

TOTAL PERSONAL INCOME AND PER CAPITA PERSONAL INCOME DEMYSTIFIED

Total Personal Income (TPI) is the income received by all persons from participation in production, from government and business transfer payments, and from investments; therefore, it is the sum of net earnings, rental income of persons, personal dividend income, personal interest income, and transfer payments.

TPI is measured before the deduction of personal income taxes and other personal taxes and is reported in current dollars (no adjustment is made for price changes).

Per Capita Personal Income is income per unit of population, or income for every person no matter his or her age. Per Capita Personal Income is the annual TPI of residents of the county divided by resident population as of July 1. The most recently published Per Capita Personal Income is for 2001, so it is TPI for 2001 divided by the resident population as of July 1, 2001. For example, Latah County's TPI in 2001 was \$763.4 million and its population on July 1, 2001, was 35,154, so its per capita income in 2001 was \$21,716.

Net earnings, a component of TPI, are earnings by place of residence. They are calculated from net earnings by place of work—the sum of wage and salary disbursements, other labor income, and proprietors' income—less personal contributions for social insurance, plus an adjustment to convert earnings by place-of-work to a place-of-residence basis. Contributions to social insurance, retirement plans, and social security are not included.

The inclusion of wage and salary disbursements by place of work results in data that doesn't intuitively appear correct. For example, the wages paid by the Idaho National Engineering Environmental Laboratory (INEEL) are higher than most wages paid in Butte County. How-

ever, because the majority of INEEL's work force is located in Butte County, the wages paid to the employees are included in Butte County's TPI. Butte County has a very small population base (2,851). The employment at INEEL is nearly double the actual population.

Another example is Blaine County, which is home to large number of wealthy individuals resulting in TPI near \$869 million with a resident population as of

July 1, 2001 of 19,780. This concept is presented in a formula below for both Butte and Blaine Counties:

Per Capita Income =

Total Personal Income / Population.

Butte County's Per Capita Income =

\$20,630 = \$58,815,000 / 2,851

Blaine County's Per Capita Income =

\$43,919 = \$868,723,000 / 19,780

Janell Hyer, Regional Labor Economist Supervisor

E-mail: jhyer@jobservice.us

317 W. Main Street, Boise, ID 83735

(208) 332-3570, ext. 3220

“What is included in Total Personal Income and how is Per Capita Personal Income derived?”

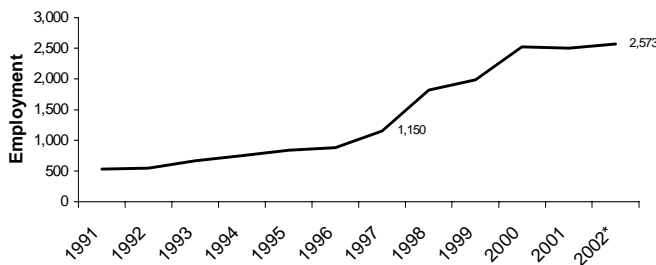
F.Y.I.

FOR YOUR INFORMATION

IDAHO'S TRIBAL ECONOMICS

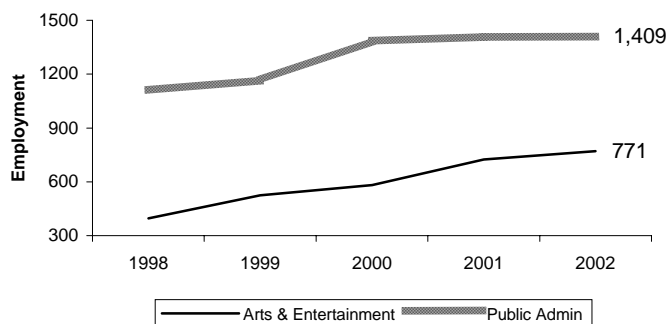
One of the fastest growing sectors in Idaho's economy over the last five years has been in tribal employment. Although Idaho has seen steady growth over the last 10 years in tribal employment, growth really picked up between 1996 and 1998 (see graph 1) when employment jumped from 881 to 1818, more than doubling.

FYI Graph 1: Idaho's Tribal Employment Growth, '91-'02



Although tribal employment is found in several industries, most of this growth can be attributed to two industries: *Arts and Entertainment* industry and *Public Administration*. These are the strong performers in the tribal economy. The *Arts and Entertainment* industry has seen employment nearly double since 1998, which is largely attributed to casino expansion. *Public Administration*, which consists of the governing bodies within the tribal community, has also experienced strong growth during the same time frame (See graph 2).

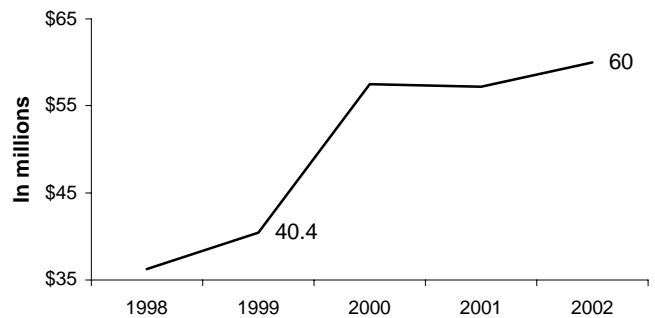
FYI Graph 2: Tribal Growth Industries



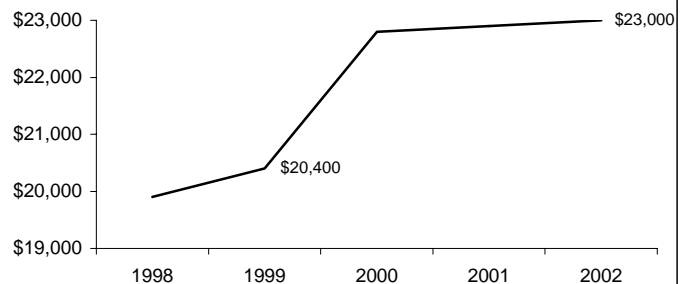
With this growth in casino employment and public administration came an increase in wages paid to employees. During the period between 1998 and 2002* wages increased by 23.8 million dollars (see graph 3) and

the average wage per employee rose from \$19,900 to \$23,000, an increase of 16 percent (see graph 4).

FYI Graph 3: Wages in Idaho's Tribal Industries



FYI Graph 4: Average Wage for Idaho's Tribal Employees



Although the number of employees that make up the tribal economy is small relative to the state of Idaho economy, the employment growth and average wage increase of the last several years provides promise for the future of Idaho's tribal economic outlook.

* 2002 data is estimated based on preliminary information.

Bill Parks, Research and Analysis Supervisor
E-mail: wparks@jobservice.us
317 W. Main Street, Boise, ID 83735
(208) 332-3570, ext. 3218

- The Butcher Block Meat Company in Pocatello has expanded. The meat company, which provides meat to several area restaurants and is a vendor for many food services, now features a deli at its South Main location. The business employs eight people.

Bingham County

- AutoZone Auto Parts opened in Blackfoot in February. The store is located at 100 North Meridian and employs six workers.
- A new exercise center, Curves for Women, has opened at the Riverside Plaza in Blackfoot. The center provides hydraulic resistance exercise equipment and circuit exercise system designed specifically for women.
- Venustas Villa, a new day spa, opened in Blackfoot. The spa offers hairstyling and massage therapy. The business is located at Lake View Plaza, Suite 4.

Caribou County

- All American Video has opened in the former City Drug Store on Main Street in Soda Springs. The 3,800-square-foot store has been completely remodeled and carries approximately 8,000 videos,

DVDs, and games. The store employs approximately 12 people.

Franklin County

- The Greater Preston Area Chamber of Commerce has changed locations. The new office is located at 49 North State Street in Preston. The new office also includes a conference room for conducting chamber meetings.
- The Preston O.P. Skaggs store, which opened in 1927, closed in February 2002. The store's closure eliminated more than 40 jobs.

Power County

- Harms Memorial Hospital completed construction of its new physical therapy building, adjacent to the hospital. The new facility provides space for improved physical therapy treatments including musculoskeletal, neurological, geriatric, wound care, and others. The physical therapy department employs three workers.

Shelley Allen, Regional Labor Economist
430 N. 5th Avenue, Pocatello, ID 83205
(208) 236-6710, ext. 3713
E-mail: sallen@jobservice.us

Seaport News — (continued from page 10)

open as early as December. Port officials had hoped that a massive office building that Regence Blue Shield has committed to construct would be the business and technology park's anchor tenant, with completion scheduled for 2005. At 55,000-square feet, the office will be one of the largest in Lewiston. It will occupy about 10 acres or one-fifth of the business and technology park.

- According to a visitor's survey, an estimated 50,000 people who have crossed Lolo Pass during the last year say they're on the trail of Lewis and Clark. Visitors at two Montana sites have been asked if they are in the region because of the bicentennial of the Corps of Discovery. The positive replies are not the millions some have predicted for the next three years, but they do indicate people are coming. In preparation, the Nez Perce County Commissioners have approved an agreement with the Clearwater

Economic Development Association to administer a \$120,000 grant that will assist with emergency services during the bicentennial. The cities of Lapwai and Culdesac will receive about \$16,000 and \$8,000, respectively, for their quick response units. Both the sheriff's air and mounted posse will receive money for equipment, including snowmobiles and ATVs. Additional enhancements will be made to communications improved with previous year's grants. Five Idaho counties and three in Montana are working together to respond to emergencies, particularly along the Lolo Motorway and U.S. Highway 12.

Doug Tweedy, Regional Labor Economist
1158 Idaho Street, Lewiston, ID 83501
(208) 799-5000 ext. 3511
E-mail: dtweedy@jobservice.us

Glossary of Labor Market Terms

Agriculture Employment: Persons on agriculture payrolls who work or receive pay for any period during the survey week. This includes owners, operators, unpaid family members who work at least 15 hours a week, and hired laborers.

Average Hourly Earnings/Average Weekly Hours: The average total money earnings earned by production or non-supervisory workers for selected industries. The average number of hours worked by production or non-supervisory workers including overtime, paid vacation, and sick leave. The data is collected for the week including the 12th of the month.

Average Weekly Earnings: Average Hourly Earnings multiplied by Average Weekly Hours.

Civilian Labor Force: A count of non-institutional persons 16 years of age and over residing within a specific geographic area, excluding members of armed forces, who are classified as employed, unemployed and seeking employment, or involved in a labor dispute.

Consumer Price Index (CPI): A national index measuring changes over time in the price of a fixed market basket of goods and services. There are two indexes—the All Urban Consumers (CPI-U) represents the buying habits of about 80 percent of the non-institutional population of the United States, and the Urban Wage & Clerical Workers (CPI-W) represents 40 percent of the population.

Covered Employers: Employers who are subject to state and federal Unemployment Insurance laws.

Durable Goods: Also known as “hard goods” because they include items manufactured or provided by wholesalers with a normal life expectancy of three years or more.

Employed: Individuals, 16 years of age or older, who worked at least 1 hour for pay or profit or worked at least 15 unpaid hours in a family business during the week including the 12th day of the month. Individuals are also counted as employed if they had a job but did not work because they were: ill, on vacation, in a labor dispute, prevented from working because of bad weather, or temporarily absent for similar reasons.

Initial Claim: Any notice of unemployment filed to request (1) a determination of entitlement to and eligibility for compensation or (2) a second or subsequent period of unemployment within a benefit year or period of eligibility.

Labor Market Area (LMA): An area that consists of a central city or cities and the surrounding territory within commuting distance. It is an economically integrated geographic area within which individuals can reside and find employment without changing place of residence. Idaho has nine LMAs.

Metropolitan Statistical Area (MSA): An area that has either a city with a population of at least 50,000 or a Bureau of Census urbanized area of at least 50,000 and a total metropolitan area of at least 100,000. The Office of Management and Budget designates the MSAs. There are two MSAs in Idaho—Boise City (including Ada and Canyon counties) and Pocatello City (including Bannock County).

Nonfarm Wage & Salary Employment: Persons on nonfarm establishment payrolls (including employees on paid sick leave, paid holiday, or paid vacation) who work or receive pay for any part of the week including the 12th of the month. It is a count of jobs by place of work. It does not include self-employed, unpaid volunteer or family workers, domestic workers in households, military personnel and persons who are laid off, on leave without pay, or on strike for the entire reference period.

Nondurable Goods: Also known as “soft goods” because they include items manufactured or provided by wholesalers that generally last for only a short period of time (three years or less).

Seasonally Adjusted: Data is seasonally adjusted to remove the impact of regular events that occur at the same time every year such as the effect of cold weather on outdoor activities, the Christmas holiday, or the summer influx of youth into the labor market.

Unemployed: Those individuals, 16 years of age or older, who do not have a job but are available for work and actively seeking work during the week including the 12th of the month. The only exceptions to these criteria are individuals who are waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days—these, too, are considered unemployed.

Unemployment Insurance: Unemployment Insurance is a program for the accumulation of funds paid by employers, to be used for the payment of Unemployment Insurance to workers during periods of unemployment which are beyond their control.

Unemployment Rate: The number of persons unemployed expressed as a percentage of the labor force.

Weekly Benefit Amount: The amount payable to a claimant for a compensable week of total unemployment.

Weeks Claimed: The number of weeks that unemployed workers claimed Unemployment Insurance benefits.

Weeks Compensated: The number of weeks for which compensation was actually paid.